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ABSTRACT

This volume contains nine case studies that focus on preservice teaching and multicultural education and four case studies on educational change, collaboration and reform for teacher training, and educational leadership. These cases are presented, followed by an introduction to conducting case study discussions, and then by discussion guides for each case. The first four cases address the following concerns: professional behavior; disillusionment about teaching; pedagogical conflict involving regular teacher, preservice teacher, student, and parent; and a controversial cooperating teacher. Case 5 deals with ethical, legal, and professional responsibilities of preservice teachers. Cases 5-9 address issues around multicultural education and present experiences of teachers and student teachers working with cultural diversity in the schools. An appendix contains a case response form. The second part of the volume presents the four change and leadership cases. The first describes the State of Virginia's attempt to articulate an outcomes-based framework for education. The second documents the process of change at the district level. The third looks at learning disabilities in adulthood. The fourth records a collaborative effort between parents, teachers, administrators, and a teacher training institution to establish a math lab in a local elementary school. Each case is followed by suggestions for discussion; appendixes to the cases contain sample materials. Several cases contain references. (JB)

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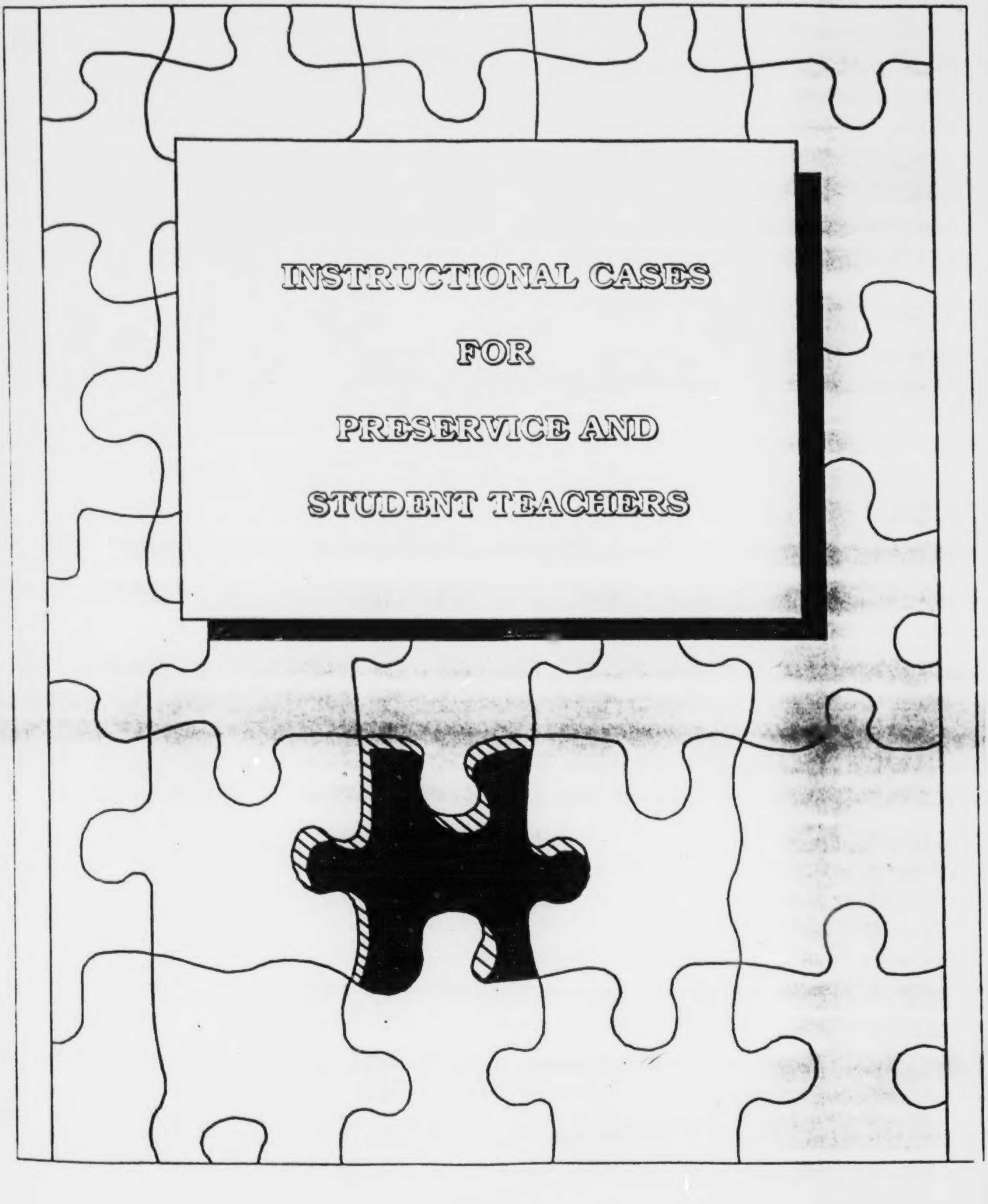

INSTRUCTIONAL CASES
FOR
PRESERVICE AND
STUDENT TEACHERS

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PREFACE

Author and educator Sara Lightfoot writes in her book, The Good High School, *". . . teaching requires such energy and commitment and passion. . ." And nurturing creative, competent and caring educators is surely the goal of every institution that prepares teachers. The daunting task has never been in defining the goal, but in determining how best to meet that end, how thoroughly and skillfully to prepare teachers for America's classrooms. The quest for an essential method and a dynamic program continues unabated after ten years of strident rhetoric and touting vigorous reform. National interest and attention remain focused on America's schools and on their center--teachers, vital shareholders in the enterprise we call education.*

While a decade of reform has not produced the quintessential program in teacher preparation, it has resulted in an emphasis on authentic, active, and cooperative learning, critical thinking, and knowledge that is relevant to the lives of learners. The case study method has proven to be an increasingly useful tool for promoting such learning and for developing the requisite skills and perspective for reflective practices, an essential component of today's classrooms and tomorrow's schools.

The cases in this collection reflect the myriad challenges of schooling today, and provide a meaningful context in which preservice teachers can examine the complex culture of schools, the debates over pedagogy and content, and the ethical issues that await new teachers as professionals in the field.

The use of case studies or problem-based curriculum is not new to the field of education. In adopting the case method for preservice training, teacher preparation shares common ground with that of at least two other vital professions, medicine and law. Medical schools in Canada and the United States have used case studies for over twenty years in the training of physicians, and the results are impressive. Small groups of students work cooperatively to confront real life problems in their field. While actively engaged in learning, students develop problem-solving strategies that offer long-range implications for improving expertise. The education of lawyers has traditionally been built on case studies of authentic legal challenges. Law students examine, interpret and debate case decisions for transfer and application to current and often unprecedented legal disputes that develop from fast-paced changes in technology and society. Given the success of the case method in these fields, it is appropriate, then, that teacher training employ this relevant approach to learning.

As we enter the twenty-first century, it is imperative that teachers be concerned with problem-solving processes as a matter of practicality. Clearly, old solutions and fixed responses no longer meet teacher or student needs in a society that is rapidly changing. Flexibility and resourcefulness are already vital teacher attributes, and their value will only increase in the years to come.

The cases herein demonstrate a wealth of knowledge about teacher preparation, and the contributions of their authors are gratefully acknowledged. Special thanks are offered to Dr. Diane Foucar-Szocki, who directed the Minigrant Case Study Competition and whose experience in the field of education is evident by the outstanding choices she made in determining the winners. Diane's responsibilities also included skillful editing. Her expertise and dedication to the project are largely responsible for its success.

In the spirit of reform and with optimism for the future of America's schools, The Commonwealth Center For The Education of Teachers at James Madison University is pleased to present these case studies to enrich preservice teacher preparation by making its study more relevant and meaningful to the real world of teaching and learning.

Mary Ellen Bafumo
Co-Director
The Commonwealth Center
For The Education of Teachers

INTRODUCTION

The nine case studies included here focus on preservice teaching and multicultural education. They are designed to help preservice and student teachers reflect on their experiences and prepare for the classroom. The cases are presented first, followed by an introduction to conducting case study discussions, and then by the discussion guides for cases 1-9. We hope this design will facilitate your use of these case studies with your students and colleagues.

The first four cases, written by Drs. Ronald Diss and Edgar Thompson of Emory & Henry College, are specific to the preservice student. The cases, developed from the writings of early field experience students, represent the issues and concerns most commonly mentioned by nearly 400 students over a four-year period. The cases and discussion guides were field-tested with combined groups of education students, classroom teachers and education professors. While short, the cases promote multiple strands of inquiry into significant issues affecting education students as they learn to become teachers.

Dr. Brenda Davis of Randolph-Macon College presents a case involving a preservice teacher caught in a dilemma of competing loyalties and responsibilities. The implications of the case are many. It invites interesting discussion for all involved in the collaborative relationships that make up teacher training.

Multicultural education is the focus of the remaining four cases submitted by a team of writers from Hampton University under the direction of Dr. Joanne Haysbert. These cases present experiences of teachers and student teachers working with cultural diversity in the schools. These cases encourage readers to examine and reexamine assumptions, behaviors and practices which influence our interactions in the classroom.

We hope you find these cases useful. Please feel free to duplicate any of them for classroom use. A read-only disk is available on request from the Commonwealth Center to facilitate your use of these materials.

CASE 1: PROFESSIONAL BEHAVIOR

BY DR. RONALD E. DISS AND DR. EDGAR H. THOMPSON

Dr. Linkous, the college supervisor of early field experiences, rushed into her office to see if she had received any messages that needed her immediate attention. She quickly went through the messages on her door and decided there wasn't anything that couldn't wait. She had already spent all morning at Rose Hill primary school, and she was due to observe Janet Spencer at Waverly Middle School at 1:15. Before she could get out of her office, the phone rang. She hesitated, knowing that she ran the risk of being late to observe Janet, but decided to answer the phone anyway. It was Mr. Bob Jones, the principal of Bellmont Elementary, another of the schools to which the college assigned students for early field experiences.

"Dr. Linkous, I'm sorry to bother you, but a problem has developed I think you need to know about. Mrs. Rivers, one of our first grade teachers, has complained to me about one of your early field experience students named Polly Piper. Mrs. Rivers says that Polly has not been showing up for her observations as scheduled. Polly has missed three of the last six scheduled observations, and on two of the occasions when she did arrive, she arrived late. Mrs. Rivers is terribly upset. She says that Polly not being there when she is supposed to be is disrupting her class because each time Polly has missed, she was scheduled to do an activity with the class. For example, she planned for Polly to practice with the children to learn a skit for 'Back to School Night,' and Polly didn't show up." Mr. Jones went on to say, "Some teachers might just complain to be complaining, but I've never had this happen with Mrs. Rivers. If she says there's a problem, there is a problem." Finally, Mr. Jones concluded, "I hate to have to say this, but Polly's attire also leaves something to be desired."

Exasperated, Dr. Linkous asked, "Good Heavens! What has she been wearing?"

"Well, it's not really that bad for a college student. She usually wears jeans and designer t-shirts. Today she has a 'Guns and Roses' decal on her t-shirt. Mrs. Rivers thinks this attire is too casual for school, and, frankly, so do I. It doesn't portray a professional image. Mrs. Rivers has spoken to Polly about showing up on time and wearing proper attire, hoping this would take care of the problem. But, for instance, Mrs. Rivers just talked to her two days ago about these things, and she showed up today in the same kind of clothing."

Dr. Linkous asked, "Was she late again today?"

"Yes, she was late again. Polly told Mrs. Rivers that she doesn't have enough time to get from her 8 a.m. class on campus to Mrs. River's classroom by 9 a.m."

"Actually, that might be a problem, but what I can't understand is why Polly let us schedule her to arrive at school by 9 a.m. if she knew that getting there was going to be a problem. You see, we have all students fill out questionnaires listing their academic schedules, leaving sufficient travel time for them to get to their field experience site." Dr. Linkous assured Mr. Jones that she would talk to Polly about both of Mrs. Rivers' concerns and get back to him as soon as possible. Mr. Jones thanked Dr. Linkous and said he would be anxious to hear from her.

As Dr. Linkous hung up the phone, she banged her hand against her head, and said out loud, "How can this be happening!" Dr. Linkous was particularly distressed over this phone call because she realized how very important it was for the college to maintain good relationships with local school divisions. Furthermore, she had repeatedly explained this expectation to her education students. She and her colleagues at the college relied upon the public schools to provide early field experiences. Without the school systems' cooperation, the program couldn't exist. Dr. Linkous had been reminded by the Dean several times of the importance of maintaining cooperative relations with the schools. The previous summer, her department had revised their early field experience handbook and had clarified the responsibilities and expectations of students going into schools. She was frustrated that, in spite of these precautions, Polly had managed to cause such a stir.

The following day, Dr. Linkous spoke to Polly after class and shared with her the contents of the principal's phone call. Polly responded, "Well, yes, it is true, that I'm not always there at 9 a.m., but the first time I went, I got there are 9 a.m. sharp, and neither Mrs. Rivers nor her students were in the room. They were at an assembly. I waited until 9:30. Mrs. Rivers finally returned with her class and gave no apology for leaving me stranded in the room. Then, she began teaching a math lesson without even introducing me to the class. She just told me to take a seat in the back of the room. After the observation period, I asked Mrs. Rivers what time I should come on Thursday. Her reply was that she couldn't say for sure what she and her class would be doing at exactly 9 a.m., but that she hoped to start math around 9 or 9:15 a.m. So I didn't think it was terribly important to show up on time because the teacher seemed so casual about my being there. Besides, I didn't feel welcome in the classroom."

Dr. Linkous then asked, "Didn't Mrs. Rivers talk to you about coming late?"

"Yes, she did, after the second time. She said she wanted me there at 9 a.m. sharp, because that's when I was supposed to be there. I've tried to do this, but on Thursdays, Dr. Blotch usually keeps us after class. By the time I leave campus and arrive at the school, I can't help but be 20 minutes late."

Dr. Linkous then said to Polly, "Mrs. Rivers said that on three occasions you didn't even show up at school."

"Oh, no," said Polly, "that's not true! I only missed going twice. You may remember that one time I told you I couldn't go because my allergies were acting up. You told me that you would call the school and excuse me. The other time I couldn't be there I called the school at 8:30 a.m. and left a message for Mrs. Rivers with the school secretary." Dr. Linkous said, "You also need to do something about your attire. Both Mrs. Rivers and Mr. Jones complained that your dress is entirely too casual. The Early Field Experiences Handbook clearly states that you should dress in an appropriate way, and I believe I mentioned during one of our group meetings that you shouldn't wear jeans and t-shirts when visiting schools."

"Honestly, I never heard you say that we couldn't wear jeans, and as far as t-shirts are concerned, the ones I wear are clean and presentable. I really saw nothing wrong with wearing these shirts since some of my own high school teachers always dressed casually, and, frankly, those teachers usually related quite well with the students."

Then Dr. Linkous said, "Inasmuch as we are guests of the school, we must comply with their expectations regarding promptness and exemplary dress for teachers. I expect you to be sensitive to these issues."

Polly said that she felt uncomfortable returning to Bellmont School and Mrs. River's class. "I feel like they have me labeled as a troublemaker, which I'm not, so I don't feel that I'll really get a fair shake at that school. As far as I'm concerned, they're as much to blame as I am. She didn't have to go to the principal, and she didn't have to call you either. She never mentioned anything to me about how I was dressed. Now she has made a mountain out of a mole hill, and I'm the victim." She then asked Dr. Linkous to assign her to another school in a different school division.

After Polly left, Dr. Linkous remembered that she needed to call Mr. Jones. She picked up the phone and dialed his number.

CASE 2: DISILLUSIONMENT ABOUT TEACHING

BY DR. RONALD E. DISS AND DR. EDGAR H. THOMPSON

Dr. Suzanne stood in the hallway greeting her early field experience students as they arrived to participate in the first seminar of the term. Dr. Suzanne had placed her education students in schools to begin their 30 hours of observation and participation. Today's seminar was one of four that Dr. Suzanne had scheduled to give her students an opportunity to discuss their experiences about the realities of school life. These aspiring teachers had been in the schools for a total of 10 hours spread over a period of two weeks, and she was anxious to hear what they had to say.

Dr. Suzanne began the seminar by welcoming the students and emphasizing that the purpose of the seminar was to give students an opportunity to share their school experiences and to receive feedback from one another. After encouraging them to share openly, she then broke the large group into smaller discussion groups. As the seminar participants talked to one another in small groups, Dr. Suzanne moved around the room. As she circulated among her students, her attention was drawn immediately to Karla, who had succeeded in capturing her group's attention. Karla was obviously distraught. Dr. Suzanne heard her say, "I'm really disappointed. I went to my assigned school thinking I wanted to become a teacher. I'm not naive. I know teaching is a difficult profession, and I know that it's not a bed of roses, but I sure didn't expect other teachers to discourage me from becoming a teacher." Karla was asked to explain what had happened. "Well," she began, "it's my first day at the school, right? And you know, I've gone to the principal and he's introduced me to Mrs. Crump. As soon as we're alone, she looks at me and says, 'So you want to be a teacher, huh? Why?' And then I say, 'Well, I've always wanted to be a teacher. Ever since I was a little girl, I've wanted to be a teacher.' And I told her how I used to play school with my dolls when I was just a little girl, and when I would play school with other kids, I was always the teacher. Then Mrs. Crump looks at me with a kind of smirk on her face and says, 'Look, honey, you've got a lot to learn. Teaching school ain't no tea party!' And then she says, 'Follow me. You'll see what I mean.'"

Karla went on to explain that her initial disappointment with Mrs. Crump never got much better. Mrs. Crump never had an encouraging word to say about teaching. "On the fourth day I was so upset listening to Mrs. Crump downgrade her students, other teachers, the parents, and the school in general, that I couldn't take it any more. I went into the teacher's lounge where I started to cry. To make things worse, Mr. Johnson, the guidance counselor, walked in, and asked me what was wrong. So I flat out told him how Mrs. Crump's attitude was really bothering me. He was very nice. He said that he believed that I would make an outstanding teacher because I seemed to really care for kids, and he told me to hang in there. He also said that it might be a good idea to talk to Mr. Jones, the principal, and to Dr. Suzanne about my feelings. I explained that I didn't want to make waves by criticizing a teacher to whom I had been assigned. I was really afraid to complain to the principal, and I didn't want Dr. Suzanne to think that I wasn't trying to be positive. Anyway, the guidance counselor then asked if I would allow him to talk to the principal about this, and I said 'Yes.' Driving back to campus that day, I told Linda about all of this. I figured that, since she's also studying to be a teacher, she'd be able to understand my disappointment and give me some advice. She said that her teacher, Mrs. Zink, was being very positive about everything. Anyway, the next time I was in the school, the principal called me in and gave me this big lecture about how wonderful Mrs. Crump was: 'No teacher is perfect,' he said, 'and Mrs. Crump probably has her faults, but down deep, she really cares for her students. She talks a mean line, and can be very straightforward at times, but her students like her and they learn from her.'" Karla dried her eyes, and said, "Then he jumped all over me because he said I had hurt Mrs. Crump's reputation by spreading negative stories about her. Apparently, Linda had told Mrs. Zink about my situation, and somehow it all got back to the principal." Karla paused for a long moment, then added, "I don't know, maybe I'm not cut out to be a teacher. The only thing I know is that if I have to act like Mrs. Crump to be regarded as a good teacher, then I don't want to teach for a living." The rest of the students in Karla's group sat spellbound. There was silence. Karla was obviously upset. She had told a heart-wrenching story, and you could feel that the other students were feeling sorry for her. Finally, Karla sat up straight and said to the group, "I just don't know what to do!"

CASE 3: PEDAGOGICAL CONFLICT

BY DR. RONALD E. DISS AND DR. EDGAR H. THOMPSON

It was not unusual for Mrs. Blevins to call and complain to Mrs. Spicer. She called frequently, whenever she thought that Joanie, her fourth grade daughter, was being hassled at school. She always insisted on speaking directly to the principal. As Mrs. Blevins had said to Mrs. Spicer on several occasions, "I believe in going straight to the top!" She was even known to call the school board office when she wasn't satisfied by Mrs. Spicer's efforts to appease her. Usually Mrs. Blevins called with a legitimate concern or complaint. Sometimes she called attention to school practices which she thought were abusive to all students, such as the time she complained about the poor nutritional value of school lunches. At other times she called to be an advocate for Joanie, e.g., when Joanie's third grade teacher allowed a classmate to tease her repeatedly during PE classes.

Mrs. Blevins concerned herself with instructional affairs as well, She complained to Joanie's kindergarten teacher that the children were spending too much time playing games. Then, when Joanie was assigned to a "low" reading group in first grade, she took issue with the teacher's method of teaching reading. She questioned the teacher about teaching children in different groups and insisted that "whole-class" grouping be used so that Joanie wouldn't feel inferior to other classmates. When Joanie was in second grade, Mrs. Blevins actually organized a letter-writing campaign to get other parents to complain to the school board because Joanie's classroom only had one computer available for 25 students. When Joanie was performing below grade level in reading and spelling during third grade, Mrs. Blevins found fault with reading materials Joanie's teacher was using, openly criticizing the program during a PTA meeting.

Without question Mrs. Blevins had a reputation among the faculty as being one of those "meddling" parents who was always ready to complain but who seldom offered a compliment when things were to her liking. She kept everyone on their toes. Mrs. Spicer believed that Mrs. Blevins meant well when she complained but that she didn't seem to understand that schools, as institutions, had "built in" flaws and limitations.

"Hello, Mrs. Spicer? This is Myra Blevins, Joanie's mother, and I am really upset. I can't believe what Joanie told me when she came home from school today."

"I'm, sorry, Mrs. Blevins. What happened?"

"Well, we've talked before about Joanie's poor spelling and reading ability and how discouraged she gets because she can't seem to please Mrs. Louis."

"Yes, we've spoken about those things and, as I recall, we agreed that maybe Joanie could benefit from some one-on-one tutoring."

"That's right, and in fact Mrs. Louis has been getting Joanie some extra help from a girl named Tia who comes from the college three times a week to work with her on spelling and writing."

"Oh, that's very good. I didn't know that Mrs. Louis had gotten Joanie a tutor so quickly."

"Well she did, and Joanie loves her, and I think Tia has helped her a lot. But now Joanie has been terribly hurt by the whole situation because apparently Mrs.

Louis and Tia don't agree on what's best for Joanie."

"That shouldn't be a difficult problem to solve. Mrs. Louis is Joanie's teacher, and she is in charge. Tia is certainly expected to take direction from her. What specifically is the conflict about?"

"Mrs. Louis told Joanie that Tia could help her with a writing assignment, one where Joanie could write on any topic she wanted. Joanie told me she was having a hard time getting her thoughts down on paper. She said she kept losing her train of thought because she had to keep stopping to check her spelling. Tia told Joanie to put her ideas on paper first, then to worry about spelling. Tia told Joanie to try this new approach at home and to let her read what she had written the next time she came to tutor. So, last night Joanie sat at our kitchen table and wrote two full pages for Tia. It was a story about a lost butterfly. Joanie felt it was an excellent story, probably the best story she had written all year. Today, Joanie showed her story to Tia, and Tia was so pleased that she gave Joanie an 'A' on the assignment. That was the first 'A' Joanie ever received for a piece of writing."

Mrs. Spicer commented, "I'm so happy she achieved such success!"

"So am I," said Mrs. Blevins, "but the success was short-lived. In her exuberance, Joanie rushed to Mrs. Louis to share her story. Apparently, Mrs. Louis smiled as she picked up Joanie's paper to read, but after a few moments, according to Joanie, she didn't look so happy. Mrs. Blevins proceeded to circle several of the spelling errors that she found in Joanie's writing and then handed the paper back to Joanie and told her that she knew that Joanie had put a lot of effort into her paper but that there were so many spelling errors, that her work didn't deserve an 'A.' She then told her to use her dictionary while she wrote because she was such a poor speller. She made Joanie feel rotten."

"Well," said Mrs. Spicer, "I can certainly see why Joanie was disappointed, but it appears to me that Tia may have disregarded Mrs. Louis' directions."

"That may be true, " said Mrs. Blevins. "But by following Tia's advice, Joanie was able to write a wonderful story. The fact is, what Tia told Joanie to do was better than what Mrs. Louis told her to do. I thought the idea of school was to motivate kids and interest them in learning. Well, that's what Tia did for Joanie. What Mrs. Louis did turned her off and caused her to lose confidence in herself."

Mrs. Spicer sighed and said, "I can understand your frustration."

"I could not get Joanie to come to school today. For one thing, she was afraid of Mrs. Louis, and for another, Tia isn't scheduled to be there today. Isn't there anything you as the principal can do to straighten out this mess. Joanie likes Tia a lot and feels comfortable with her. I want Joanie to be able to return to school feeling good about herself and respecting her regular teacher. At the same time, I wonder what Mrs. Louis is up to when it comes to teaching writing. I can't believe something like this has happened."

CASE 4: CONTROVERSIAL TEACHER

BY DR. RONALD E. DISS AND DR. EDGAR H. THOMPSON

Dr. Brenda Young, chair of the education department and her graduate assistant, Jack Hemp, were returning from the cafeteria when Brenda remarked, "You know, Jack, I think our early field experience program is getting better all the time. I keep getting good feedback from all the students. You've done a good job assigning them to the schools and conducting their seminars."

Jack smiled, obviously welcoming the compliment, "Thanks," he said, "I agree. Things are going more smoothly, aren't they? Naturally, the students still complain that the program is very time-consuming and that it requires a lot of work, but overall, I think they are having a positive experience. I do worry about the placement of one or two of the students, though. In fact, I had pretty much decided to talk to you about a particular concern that I had."

"Oh, . . . what's on your mind?"

"Well," Jack said, "even though our early field experience program has improved over the past few years, we still have some problems to iron out. For instance, we've made great progress by getting principals to assign our students to exemplary teachers so that they will observe quality teaching. This has pretty much been the standard for the past few semesters, and I think it has really paid off for our students. I've noticed that more positive topics are being discussed at the seminars than ever before. The students seem to be more tuned in to the things that really count."

"Good. So what's the problem?" asked Dr. Young.

"Well," Jack sighed, "it seems as though Roberta and Jennifer have been assigned to Mr. Randall, a teacher at the high school who is regarded by everyone as being an outstanding teacher. He has developed an excellent rapport with his students. They love him and flock to his classes. The man is extremely effective and has undoubtedly developed this competence over a period of time. To hear Roberta and Jennifer talk, there is no better model teacher to emulate. During seminar they constantly relate to others in the group the tactics that this man uses, as though what he does is the absolute standard to imitate. But I'm afraid that beginning teachers who try to do what he does are going to fall flat on their faces."

Dr. Young asked, "What do you mean?"

"I hear them boasting that Mr. Randall is very entertaining, doesn't write lesson plans, and is able to control his class without using a strict discipline plan. I'm afraid they're just seeing Mr. Randall on the surface. It is true that he is an excellent teacher and popular with his students, but the man has 13 years of teaching experience. He has absorbed a lot about teaching that new teachers just haven't yet experienced. For instance, they don't think he has plans. They think he just 'wings it.' Actually, he is carefully planned, but he doesn't have the plan written down so you can read it. The students don't see how his experience is allowing him to succeed with lessons, something they won't be able to accomplish for some time. And another thing, our students don't think he has any discipline plans. Actually, they don't realize that his experience enables him to prevent such problems before they occur."

Dr. Young said, "Maybe you should invite Mr. Randall to a seminar and ask him to describe his planning and how he maintains discipline."

"Yea, I thought of that, too. I spoke with Mr. Randall and suggested that perhaps he could come to a seminar and explain all that he does to be successful. Mr. Randall agreed to do this, but he made it quite clear that he would have to be honest and say that he thinks that we overemphasize planning to our education students. In fact, he told me that he knows some first year teachers who are so well planned that they're boring. He said to me very emphatically, 'Their attitude is that if they've spent time planning, then they're gonna teach the lesson as planned, come hell or high water.' Mr. Randall also doesn't believe in having a written discipline plan. He says he just respects his students, knows when to 'look the other way,' and knows how hard to push individual students at any given time. He believes that this approach is more effective in getting students to cooperate than having a strict and uniform compliance plan. To quote Mr. Randall, 'Life in a classroom is not an either/or situation, and whenever you try to treat all the kids the same, you'll end up losing them.'"

"So I'm sort of stuck here. I'm glad we have our students observing outstanding teachers, but we certainly don't want to mislead them with examples like Mr. Randall, do we? I mean, what message are they getting?"

CASE 5: ZACHARY'S DILEMMA: ETHICAL, LEGAL, AND PROFESSIONAL RESPONSIBILITIES OF THE PRESERVICE TEACHER

BY DR. BRENDA M. DAVIS

"Here, Mr. Will, take a look at this," whispered Chuck as he handed Zachary, a preservice teacher, a folded newsletter-type publication during Ms. Hamner's government class. Zachary took the publication and, without glancing at it, put it inside his notebook. Just then the bell rang and, as always, the students scattered noisily from the classroom. Zachary also packed his notebook and prepared to leave the classroom, having concluded the day's field work. Before leaving, he told Ms. Hamner he would be back next week to continue his twenty hours of field work which would continue over a ten-week period.

On the way to the parking lot, Zachary wondered what was in the folded paper Chuck had handed him. Chuck was an interesting young man. He was bright and creative, a leader of his peer group--a group that seemed to be on the outer edge of the usual high school crowd.

Once in his car Zachary read the four-page publication with curiosity. The paper was punctuated with vulgarity. The articles included commentaries on homosexuality, racism, and criticism of the school and society. One specific article outlined punishable student infractions from the student handbook, including the use of profane language or gestures and defiance directed to teachers or administrators. The student publishers then responded defiantly by writing, "F--- you," and "Have a nice day, A------!"

Despite his shock, Zachary was somewhat impressed with some of the insights the high school students showed in their writings. For example, in the article on racism the students wrote, "We have to teach our children, our friends and even our parents that racism in any form is unacceptable. We have to speak up when we hear a racist joke."

Zachary wondered, "How should I react to this paper? Oh well, I guess it is not really that important. I know Ms. Hamner is aware of the publication and she hasn't said anything to the students or to me. I doubt she would say anything to me anyway. She just tolerates my presence in her classroom." In fact, he had not even been introduced to the class until one of the students asked Ms. Hamner, "Who is this guy that keeps coming into our class?"

Zachary's placement in Ms. Hamner's class was further complicated by his being captain of the soccer team. Ms. Hamner found his inconsistent schedule inconvenient. Zachary felt unwelcome and an intrusion to the class. He wanted to do a good job in his field placement and still meet his other campus obligations.

Zachary shook his head and wondered, "Why do I always get in such complicated situations?"

One week after receiving the student publication, Zachary saw Dr. Miller, his college supervisor, as she passed him in the hall at the college. He stopped and asked, "Do you have a minute?"

She replied, "Sure, I will meet you in my office."

Zachary went to the office and took the publication out of his notebook. He glanced over the articles again while waiting for Dr. Miller. She came in and asked, "How are you and how are things in your education courses and field work since our last discussion?"

Zachary responded, "I think everything is okay, but I thought you might like to see what a student gave me last week when I was in Ms. Hamner's class."

Dr. Miller felt she was not too prudish or Victorian in her views, but the publication raised her eyebrows! She cleared her throat and said, "This is interesting. Could you tell me a little more about the circumstances surrounding your receipt of the publication?"

Zachary recounted the details of how he was given the newsletter and just stuffed it in his notebook. He explained that he read it later after leaving the class. Zachary then said, "I really don't think this is any big deal, but I thought it did exemplify some of the characteristics of adolescence we had learned, such as rebellion against adult authority."

Dr. Miller agreed that this was an interesting insight about the articles in the student handbook. She then inquired, "Do you have any ideas about why the student elected to give you this publication?"

Zachary answered, "I guess the students like me and trust me. They see me as a friend. I also think that the students just wanted to see my reactions, but I did not respond."

Dr. Miller then asked if Zachary had shared this with Ms. Hamner or with any other teachers or administrators at the school. Zachary said he felt certain Ms. Hamner knew about the publication, but she'd said nothing about it. Based on this assumption and his lack of a good working rapport with Ms. Hamner, he acknowledged that he hadn't mentioned the student newsletter to her or shared it with anyone at the high school or college until his meeting with Dr. Miller.

Dr. Miller said, "I appreciate your willingness to discuss this situation with me. It is a circumstance that could have implications for you as well as for the collaborative relationship the Education Department enjoys with the county schools. I am obligated to share what you have told me with Dr. Glenn." Dr. Glenn was Zachary's Educational Psychology professor as well as the high school principal where Zachary was doing his field work. Interestingly, Dr. Glenn was quite responsive to students in his role as professor but less accessible as the high school principal. Dr. Miller explained, "Whenever we place students for field work in any public school, the College and the preservice teachers are then part of that organization. Thus, we are obligated to adhere to its decision-making policies as well as any legal guidelines or restrictions that the school may have."

Zachary said, "I understand what you are saying, but I do not see this as any big deal. I just thought I should tell you since this seemed a bit unusual."

Dr. Miller called Dr. Glenn later that day. She said, "A preservice teacher in a field work placement has been given a copy of an obscene underground newsletter that is being circulated at your school. I do not know the names of the students involved, but the newsletter was given to Zachary Will while he was observing in Ms. Hamner's class."

Dr. Glenn was not aware of the publication and thanked Dr. Miller for her call. Dr. Glenn explained, "I am glad you let me know because the student handbook specifies that no distribution of vulgar or inflammatory materials is permitted on school property. There are legal issues at stake as well as concerns for the students who are publishing such materials. I will need to explore the issue with the county attorney, the faculty and the staff, as well as with the students." He did not say whether he would speak to Zachary. He also did not indicate whether he would call Dr. Miller after he had more information.

Several weeks later, Dr. Miller spoke with Dr. Glenn and asked about the student newsletter situation. He responded that on the same day that she had called him, a couple of teachers told him of the publication. The issue was passed to the high school intervention team of students and parents. They were still deliberating about what should happen to the students responsible for creating and distributing the newsletter.

At the end of the second semester, Zachary met with Dr. Miller about his field work and his upcoming student teaching placement. He asked, "Oh by the way, what happened to the high school students who wrote that newsletter? I heard rumors that they were suspended and that one was even expelled. Those really seemed like severe punishments to me."

Dr. Miller then told Zachary what she had learned from Dr. Glenn about the case. She could not confirm or deny what had happened to the students.

Zachary left the office and wondered if he had really done what was best when he shared the situation with Dr. Miller last fall. He also questioned how much his input was even valued because no one contacted him or informed him of the outcome.

As Zachary walked away, he speculated, "What would I do in a similar situation in student teaching or in my first teaching job?

CASE 6: A STUDY IN MULTICULTURAL EDUCATION: WILMA KENNEDY

BY DR. KATHRYN KISABETH

One Thursday afternoon at the end of a typical day at East Middle School, I over- heard several sixth grade boys bantering about a threat made by another student, David Wood. I slowed down so as not to stop the conversation and listened carefully to glean all the possible information. It became clear that David Wood had threated the physical education student teacher. Something about "having his job!" The boys laughed and assured each other that it was just another one of David's "hot air" outbursts. I knew that Mrs. Smith, a competent, respected five-year veteran of our staff and the cooperating teacher in physical education, had left just twenty minutes earlier for a conference. I reminded myself to make a note to discuss this matter with Mrs. Smith on Monday.

As I drove the fifteen minutes home that evening my thoughts returned to David Wood. He was a child with a chameleon-like nature. Academically, he excelled in language skills and factual content; however, higher-level thinking skills and conceptual content were difficult for him. He seemed to invest himself in always being right. Given that several of his classmates were masterful, creative thinkers, David often found himself short of his goal. David's slight weight problem and lack of physical prowess also resulted in poor performance in physical education activities.

I arrived at the office the next morning expecting a typical Friday filled with paper work. Ms. Jones, the secretary, greeted me. "Good morning, Mrs. Kennedy. You have a very important message on the phone mail. I saved it so that you could hear it for yourself." I entered my office and sat down to listen to the phone message. I activated the message machine. "Mrs. Kennedy, this is Ms. Wood, David's mother. I must have a conference with you immediately about Mr. Taylor, your physical education student teacher. David told me that Mr. Taylor tried to drown him yesterday in the swimming pool. I think that you need to remove this man from the school immediately to protect the young children. He has no business working with children and endangering their lives. My father and I demand that you meet with us immediately! We will be waiting for your call." I signaled the secretary. This was not going to be a typical Friday.

"Ms. Jones, please call Tony Taylor and ask him to see me immediately. Tell him that it is very important. After you have contacted Tony, please call Ms. Wood and arrange a conference with her for 9:00 or 9:15."

While waiting for Tony, I thought about what I knew of David's family. Ms. Wood was a 31-year-old single mother raising two male children, David and an infant brother. I knew there were financial difficulties. She relied on her parents for both financial and emotional support, while working part-time at Social Services and going to college. She and her parents were very protective of David and saw him as a born leader. From my observation of David at school, David spent most of his time trying to impress his classmates in hopes of gaining respect. A firstborn child, he was also the only grandchild for ten years. Ms. Wood worried constantly about raising her sons successfully to adulthood in a society where the African American male mortality rate is so high.

Ms. Wood and I had discussed this fact after both attending several of the same meetings. Her parents greatly exacerbated her fears by regularly sharing stories they read in the papers, saw on T.V., and heard from their neighbors during the day while their daughter was working. The sound of the intercom pulled me from my reverie. "Mrs. Kennedy, Ms. Wood and her father are in the outer office."

I glanced at the clock; it was nine o'clock. "What happened to Tony?" I inquired. Ms. Jones said that his call about car trouble had arrived just as the Wood family entered the office.

I decided it would be best to see the Wood family at the scheduled time, considering the uncertainty of Tony's situation. I knew I could speak with Tony later in the day to get his account of the swimming incident.

I picked up a copy of the school regulations for recreational swimming and Tony's performance record. Ms. Wood and her father were waiting for me. Mr. Wood faced me immediately and with a firm grip on his daughter's arm came forward. Before I could introduce myself, Mr. Wood thrust his daughter forward toward a chair and sternly nodded his head. Ms. Wood immediately began talking in a loud voice. "What do you intend to do about Mr. Taylor?

"Please, let's sit down. Ms. Wood, tell me what David told you about Mr. Taylor." Leaning across the table, Ms. Wood in an emotionally distraught voice said, "You couldn't possibly understand. I'll bet you have never lost anyone dear to you. My son was nearly drowned yesterday by one of your teachers. I get up every morning and send my son to a place I believe is safe only to find out he could have died."

"I assure you I understand what it feels like to lose someone very close. The purpose of this conference is to ascertain exactly what did happen in the pool yesterday afternoon. Mr. Neil, the pool lifeguard, has informed me that in his opinion David was in no danger although he was frightened. Mr. Taylor did come to David's aid as soon as he saw David's distress."

Cutting me off and in a belligerent voice, Ms. Wood demanded, "What training does Mr. Taylor have? Is he a certified teacher? What does he know about working with children like David?"

I opened the folder containing Tony Taylor's record and selected my words carefully. "Ms. Wood, Mr. Taylor's academic performance is very high. He has received citations for excellence in teaching, and in addition, he has positive recommendations for his work with several volunteer groups. Mrs. Smith, the cooperating teacher, has also written several positive comments on his work with the children here at East Middle School. Mrs. Smith was at the pool yesterday; however, she is away at a conference today. I assure you that we will have a meeting with Mr. Taylor upon her return. We will review Mr. Taylor's conduct in relation to school policy and take appropriate action." I knew that Ms. Wood was close to Mrs. Smith and that there was mutual respect between the two women. "I assure you that David's and every child's safety is important to me and all of the personnel at this school. Please trust me to deal with this matter appropriately." She appeared calmer and receptive to my assessment and plan for dealing with this matter. She turned to her father for support just as Tony Taylor entered the room.

With a wide-eyed stare at Tony, Ms. Wood gasped, "He's huge! He's the one who tried to drown my son?"

I registered the shocked look on Tony's face. I recognized that, while being 6'2" and 200 pounds was certainly an asset on the football field, it could prove to be a significant liability in this situation. The calm that had filled the room just seconds before had vaporized. I wished that Tony had arrived earlier for our private meeting. Now I hoped that he would be mature enough to select his words carefully during this encounter.

I faced Ms. Wood and said, "Would you please allow Mr. Taylor the opportunity to give his description of yesterday's events?" As Mr. Wood pulled his daughter into the seat next to him, Tony's eyes met mine. Tony began, "During the recreational swim class, I was playing with several of the boys. I was lifting and tossing them into the water. We were all laughing and having a good time. David was not involved in this play but was in the area and was talking with the boys involved in the game. After several minutes, David asked me to lift and toss him. I said 'yes' and lifted and tossed David just as I had the other boys. When David emerged from the water, he was spitting water and coughing. I immediately helped him to the side of the pool. I lifted him from the pool and asked if he was alright. He said 'yes.' Then I heard some of the boys teasing him about not being able to 'take it.' I told the boys to stop and climbed out of the pool. I continued to watch David as he reentered the pool and played during the remainder of the class. All of the boys then entered the locker room at the end of the class."

I asked Tony if there were anything else that he wanted to add. Tony glanced nervously at me and then at Ms. Wood and said, "Mrs. Kennedy, some of the boys told me that David said I tried to drown him. When they laughed, he said he would ruin me and have my job."

Ms. Wood immediately responded, "As big as you are, there is no way you could know your own strength. You should have known better than to play with small boys in such a manner. David's not like the other boys. He doesn't like roughhousing."

Mr. Wood looked at Tony and with disdain in his voice said, "I've taught David that I want more for him than an athletic future. We discourage any form of rough play in my home!"

Tony looked directly at both Ms. Wood and her father and said, "I am sorry if I frightened David. I had absolutely no intention in hurting him. I would not hurt any child. I love children and I want to be a positive role model for them. Please accept my apology."

Turning from Tony, Ms. Wood looked at me, "I expect this man to be dealt with severely. You have not heard the last of this." She and her father stood to leave the room.

I stood and looked at both of them, "I will conduct a thorough investigation and as part of that process will speak with Mrs. Smith." Ms. Wood glared at me and said that David would no longer participate in the recreational swim program. The Wood family left the room.

I looked at Tony. "Is there any adult who can verify your statements concerning this incident?" He looked at me and replied, "Mrs. Smith saw everything."

Later that afternoon Mrs. Smith verified Tony's description of the incident.

CASE 7: A STUDY IN MULTICULTURAL EDUCATION: ANGELA ARMSTRONG

BY MS. CATHERINE S. JOHNSON

February 1

Dear Mrs. Armstrong,

As you know, two other parents and I are planning a class pizza party as a farewell for Bobby Davis who will be moving to Germany with his family in a few weeks. Anthony was helping me address the invitations for distribution. Anthony said, "We don't need to send one to Wang Ho." When I asked why, he replied, "Nobody likes to hang around with him anymore, and besides, he doesn't like to hang around with us either."

I explained to Anthony that this was a class party and we would be inviting everyone in the class to attend. I did, however, feel that I should let you know about this incident.

Sincerely,

Martha James

Mrs. Armstrong, the classroom teacher, had noticed some social interaction difficulties between Wang and the other children. For example, her fourth grade class has structured physical education with a specialist three days each week, but the other two days she takes the students outside, weather permitting, for what she calls free-play. During free-play the children organize themselves into two or three small groups to play a variety of games which include kickball, dodge-ball, and a "throw-the-hoop" game. Wang usually joins the kickball game. But again today, as has happened for the past few weeks, Wang chose to take a small paddle-ball set outside and play by himself. Mrs. Armstrong approached Wang and asked him why he was not playing kickball today. "Oh, I just felt like doing this for a change, " he replied.

Rather than push the issue, she accepted Wang's answer, changed the subject, chatted a while longer, then moved away to talk with other children. Mrs. Armstrong waved her arm in the air to signal the end of free-play.

Math class began shortly after free-play. Ten students were working on multiplication skills, eight were beginning division, and three were still working on addition and subtraction skills. Wang was working independently on fractions and beginning decimals.

Mrs. Armstrong began today's math class by announcing the names of the "Math Power" ribbon recipients. Math Power is a school-sponsored competition. Students take a series of timed tests in addition, subtraction, multiplication, and division. Participants earn a button and add a ribbon with each test passed. A special gold button with ribbons is awarded when a student passes all five tests. Each test consists of 100 problems which must be completed with no mistakes in order to earn recognition.

"And a very special award, one that should make our whole class proud, goes to Wang Ho, who has passed all five tests. Wang is the only fourth grader who has received this award so far this year," said Mrs. Armstrong, smiling.

Wang, proudly smiling, walked to the front of the room to receive his award. As he walked toward Mrs. Armstrong, she heard muffled negative comments from several children, while others made faces behind Wang's back. Mrs. Armstrong mades note of the negative reactions but chose not to draw attention to the matter in front of the entire class.

In addition to winning his Math Power button, Wang was the school representative to the city-wide math bee. The principal had announced Wang's selection over the public address system during this morning's announcements. This was a great accomplishment for Wang, who had come to the Lab School a little more than a year earlier because his parents thought he needed a more stimulating, less structured environment than his local public school offered.

Following the Math Power awards, Mrs. Armstrong began the math lesson with a large group instruction session as a way to review the morning's assignments. Mrs. Armstrong called on Wang, whose work was accurate and neat, to put several of the most difficult problems on the board. This was a difficult assignment. Many students raised their hands, requesting assistance. Mrs. Armstrong circulated around the room to help. As she often did, Mrs. Armstrong asked Wang to help some of the students too. Mrs. Armstrong often asked Wang to aid other students with difficult math concepts. While not intending to treat Wang differently, she often gave him more wait time to respond than other students. She was proud of him and praised his accomplishments to other teachers and his classmates. Wang seemed to enjoy math. He did as Mrs. Armstrong asked.

After completing the review of the morning work assignment, the students began working in small groups. Mrs. Armstrong moved among the groups, introducing a new concept to each group and allowing time to work on some individual problems to reinforce the concept presented. The math lesson concluded when it was time for the students to go to lunch.

All students in the school ate lunch in the cafeteria, the fourth graders in an area with two large tables which seat 20 students each. With only 24 students in class, Mrs. Armstrong's children sat in small clusters with vacant seats between each small group. Wang usually sat with a group of 5 other students. Today, however, on her way to the lounge Mrs. Armstrong noticed Wang sitting by himself.

Wang's mother, a college professor with a Ph.D. in physics, arrived shortly after lunch to pick him up for a dental appointment. "I'm so proud of Wang. He won his Math Power button today. Wang is the only fourth grader to have one," Mrs. Armstrong enthusiastically reported to Dr. Ho.

"Oh, we're so pleased. Wang is such a hard-working student. I want him to start studying right away so that he'll do very well--maybe even win the math bee," responded Dr. Ho.

"I'm very confident about Wang's math ability. He's a delightful student. It's a pleasure to have him in class. I do, however, have a concern I'd like to speak with you about. Wang seems to be having some problems relating to other children. I've noticed that he's started playing alone during free-play outside, and today he sat by himself at lunch," Mrs. Armstrong reported.

"Oh, I don't worry too much about things like that," Dr. Ho replied. "He's so smart and has always been so intellectually advanced that I think it's hard for him to relate to other children who aren't as advanced as he."

"He is a very bright child, but he is still a child and having friends and interacting with his peers is a very important part of the school experience," Mrs. Armstrong explained.

"I agree with what you're saying, but Wang does have friends. He plays with other children at home; he just likes to play with older children who are more on his intellectual level," Dr. Ho maintained defensively.

"I know that you have an appointment to keep, and I have to get back to my class, but I feel very strongly that we need to discuss this matter in more detail. Let's make an appointment for a conference," Mrs. Armstrong said in a pleasant but firm tone.

"Well, okay," Dr. Ho replied hesitantly, "just let me know what's convenient for you and I'll try to arrange my schedule."

CASE 8: A STUDY IN MULTICULTURAL EDUCATION: ADELE DAVIDSON

BY MS. SONYA M. DAVIS

"After you chart the classes of animals and list at least three characteristics of each animal independently, then you will create an imaginary animal using different characteristics from each class of animals. You will be able to work on this project in cooperative groups. A list of your groups will be placed on the wall. Remember, you do not crowd around the list. No more than two people should be reviewing the list at one time. Time will be allotted during class daily to work on your project. Michael, do you have a question? No? Then you should not be talking. You should be facing front and listening. Thank you! Now each person in class is to participate in the group project and, above all, each person in the class is to cooperate. Remember our group rules and follow them. I will place varied materials on the table by the window that you are free to use. Please remember that . . ."

"I don' wanna make no dumb animal! It's stupid! An' I don' wanna be in no dumb group, neither! All I wanna do is draw. Nobody can draw as good as me," Keenan screams.

"Well, Keenan. This is a group assignment, and you will participate. After all, your group will need your great art skills. I know your group will appreciate the way you draw. So now, you need to listen to the directions so you will be able to follow them," states Ms. Davidson.

"Dis is stupid! I'm not gonna' do it," Kennan stubbornly shouts.

"If I could list the many times that Keenan has interrupted directives to tell me what he is going to do and what he is not going to do, I'd have a list as long as a young child would give Santa Claus. And with my headache today from lack of sleep last night--will I be able to survive another day of Keenan's dramatics? The month since he arrived here from public school has been trial and error, and yet nothing seems to work. One day I think I am really getting to him. Then the weekend comes and he returns with his usual negative attitude. I have gotten little sleep the whole month, thinking of what I can do to save this child.

He leads such a chaotic life. He's now living with his maternal grandmother because of his young, drop-out mother's on-going battle with drug addiction and with abusive men. Yet, grandma's led a hard life and still drinks quite a bit. He has no contact with his father, who never married his mother. It's rough wherever he lives. None of this helps his academics or self-esteem. My director gives no help, but says I should be able to handle those 'minor' behaviors in my classroom and not send him to her so much. Can't she see that Keenan does not have 'minor' behavior problems? They have grown and it is not helping him academically," thinks Ms. Davidson.

Suddenly, she is jolted back to reality as a loud scream permeates her consciousness. She turns in the direction of the scream to find Keenan once again in his favorite pose--fists balled up, arms hanging rigidly at his sides, body leaning toward his foe, and an angry, wild expression on his face. "Not again," she thinks to herself, moving quickly toward Keenan.

Melina hollers, "Ms. Davidson, Keenan said I was stupid and then he hit me on my arm."

Ms. Davidson looks from Keenan to Melina, who has tears streaming down her face. *I glance toward the door, waiting for the water to come rushing into the classroom full force with the bubbles from the Calgon bubble bath hurriedly taking me away.* She turns back to Keenan, who admits that he did call Melina stupid but says he only "tapped" her on her arm.

"It didn't even hurt her. She's just a cry baby!" he retorts.

Ms. Davidson calmly reiterates to Keenan that students do not hit nor do they call out negative comments. "You know the rules, Keenan. You must sit out during outside time."

"So!" he screams. "I don't want to go outside anyway!" He then marches to his seat and puts his head down on his desk. Ms. Davidson looks at Melina's arm; it appears fine. Ms. Davidson asks Melina if she will survive. She wipes her eyes and nods her head "yes." Ms. Davidson hugs her and walks her back to her seat.

As usual, once Keenan has a tirade, the class divides into two groups--the opinionated and the shy. The opinionated repeatedly let Mrs. Davidson know that Keenan is always bothering people, that he's mean, that he hits people, and that they do not like him. The shy simply sit and watch with no comment.

Ms. Davidson moves back to the front of the classroom. "Getting back to our class project. Are there any questions?"

"When do we start?" asks Damon.

"We begin today," she responds. "Are there any more questions?" When there are none, she continues. "O.K., lets review the characteristics of the animals we've studied. Let's begin with amphibians. Who can give me one characteristic of an amphibian?"

As the class moves quickly through a review of the classes of animals, Ms. Davidson notes that Keenan has not paid attention. He has kept his head down while having a pencil war on the top of his desk. She ignores this behavior, completes the review, and instructs the class to begin on their individual charts of animal characteristics. "Any questions, before you begin, class?" she asks. No hands are raised, so she continues, "You may be . . ."

"I don't understand nothin'," shouts Keenan.

"Well, Keenan, you come up to me at my desk and I'll explain it to you. Class, you may begin. While you are working, if you have questions, do not get out of your seats. Raise your hand and I'll come to you. Come on, Keenan. Bring your book."

"Why do I hafta bring my book? I don' need it. I can't even read the dumb thing. I don' like this stupid school," states Keenan.

While gazing at Keenan through slitted eyes, I begin singing a verse in my head from one of my favorite songs--"This old man he played one. He played knick knack on my drum, with a knick knack paddy whack, give a dog a bone. This old man came rolling home . . ." Then Ms. Davidson sternly says to Keenan, "Keenan, come to my desk now and bring your book!"

He snatches up the book, looks around the class and says, "What y'all lookin' at?" Then he proceeds to Ms. Davidson's desk. She points to the chair that she has pulled beside her desk, motioning him to sit in it. He flops down loudly and slams the book on the desk. She continues to look at him. He, however, refuses the eye contact, mumbling under his breath, "Make me sick. I hate white people!" She takes his book and flips to the section under review that today. Keenan slouches down in his chair, arms bent on top of the desk, with his head on his arms, his lips pouting. "Nobody likes me," he says.

I look at Keenan and suddenly I am taken back to the first day he entered my classroom, one month ago, from a public school setting. A woman I later learned was his grandmother stood menacingly in the doorway and said, "I hope you can teach better than the teacher he had before. Had to take him out of that school. Nobody liked him and they wasn't teachin' him nothin'. Are you white? 'Cause he had a lot of white teachers and he don't like white teachers. They mean to him."

Beside her, a child moves toward me down the hall with the most frightened look on his face. As I move toward him, his expression changes quickly to be replaced by stubborn belligerence, a mask he would hide behind continually. "This is my grandson, Keenan. I told you he didn't like white teachers. They told me his teacher was black!" Keenan's grandmother said emphatically. I looked at her, then at Keenan, and said, "I am black."

Ms. Davidson looks back down at Keenan sitting stubbornly at the desk, and tears spring to her eyes. She says, "Keenan, let's skim through the chapter to see what you remember."

"I can't read that old book. I'm sick of school," he says.

"Well, let's see anyway. Here, look. This is where we began talking about the classes of animals. Start reading here." She points to the word in the book. Keenan glances furtively around the room as if to see who's watching or listening. Ms. Davidson reminds him that no one in the class is looking at or listening to him. She urges him on, cautioning him not to be afraid to read.

He looks at her and says, "I can't read."

She says, "Keenan, I will help you." She smiles and says, "Go ahead." He again looks around, then back at her, then at the book. She is still pointing to where he should begin.

He starts, "In this c-c. . ."

"Chapter," she says.

"Chapter we will-l-l. . ."

"Learn," she says.

"Learn a-a- . . ."

"About," she says.

Then Keenan snatches the book and hurls it across the room over the heads of several students. It hits the wall with a loud smack and falls to the floor. He then stands up from the desk and knocks it over. Several students stand up from their chairs, unsure of what to do. All eyes are now on Keenan, defiantly standing in his favorite pose. He screams, "Wha' ch' all lookin' at?"

At that moment, the door swings open and Mrs. L. (the principal) enters. She looks around, sees the desk on the floor, sees half the class standing-terror in their eyes, sees Keenan poised and tensed, and finally rests her eyes on Ms. Davidson.

CASE 9: A STUDY IN MULTICULTURAL EDUCATION: MS. M. B. NIA

BY MS. CHRISTI R. ROBINSON

It is fall and pictures of Pilgrims and American Indians are plastered on the walls of Elkhart Elementary School. Ms. Nia is reviewing her district's social studies curriculum. She notices that there is very little information about the American Indian. While our current language continues to change, she reflects on how "Native American" refers to everyone born in America and how many tribes have adopted the term "American Indian" as best identifying who they are. She is quite sensitive to ethnic identity and is appalled that others here are not. She thinks to herself as she reads, "'When Columbus discovered America . . . ,' what about the hundreds of native tribes that lived as nomads and farming people before Columbus? I can't stand this popular tale of the heroic Christopher Columbus discovering and subduing this land."

Her thoughts continue, "There is very little information here about the severe and detrimental impact forced colonization had on the indigenous peoples. Also, as they describe the voyage of Columbus, they make no mention of the role African slaves played in this journey to the new land."

Ms. Nia is concerned about teaching this very one-sided unit on the discovery of America. She seeks counsel from her team partner. "Can you believe this unit? Not only are the historical facts misconstrued and biased, but very little of the text supports a multicultural perspective and teaching style!"

Hesitantly, her team partner responds, "Well, I understand your point, but all that other stuff, is well, er, depressing. We don't want our students to become disillusioned with American history. Besides, they are probably too young to really understand what is going on." More confidently she adds, "We've not received any complaints from any one so far about our curriculum. We even have some special events planned. When you have time, come and see me and I will share some of the ideas with you," her team partner says as she walks quickly away.

Ms. Nia says to herself, "What is going on here?" Slowly, she re-enters her room. There she finds her team partner and two other fifth grade teachers deep in discussion about something involving her. Her team partner looks up at her like a guilty child. One teacher looks indifferent, while the last looks angry.

Her team partner says, "Hey! I thought that maybe we could help you come up with something for your Columbus lesson."

"It is not that I need help; I just believe the information presented is biased and deceiving. I will not teach such a lesson. It goes against everything that I stand for," Ms. Nia protests.

"What is wrong with you!" cries the angry teacher. "You are a first year teacher. There is no room for 'feelings.' You follow the curriculum and do as you are told. By the way, your room needs to be decorated by themes here, and the current one is Christopher Columbus."

Ms. Nia becomes instantly defensive. "So you are trying to tell me that I am supposed to go against history and create a lie to tell these children about the discovery of America, never mind the numerous rapes, diseases, and famine this wonderful explorer brought! History is a cycle that has to be understood, not hidden, or else it will repeat itself. I guess you also want me to say the American Indian was a savage that did everything to the white man. Maybe I will bring in some Lone Ranger movies and explain that this is how American Indians behaved, except for Tonto, of course!"

The third teacher tries to calm the air. "Well, Ms. Nia, let's put it like this. Why don't we help you come up with some ideas and fix up your room. Besides, we also need to plan for the Thanksgiving play that the PTA is sponsoring. I don't think anyone is saying that you are wrong, but you must realize that we work as a team. If one of us does not do her job, it reflects on all of us."

"Yeah," states her team partner. "We are only trying to help you. We have been teaching longer than you, and we do know a few things."

Ms. Nia recognizes her situation is hopeless. She decides not to discuss the thousands of American Indians who perished due to the violence, disease, and despair brought on by the "discovery" of America. Ms. Nia's plea is perceived by her colleagues as radical, unnecessary, and too heavy for the children at this age. The response of her colleagues is not what she had hoped for.

Ms. Nia realizes she is seen as a revolutionary who will grow out of her views. Yet, she knows that her teaching style and multicultural perspective are parts of her own fundamental belief system. "I am going to bring higher-level educational concepts to my students," she thinks. "I am going to broaden and open children's minds to probing and thinking for themselves." She wonders if this is truly practiced by her colleagues in the classroom setting here.

Perplexed, Ms. Nia seeks counsel from her principal, Mrs. Blind. "Mrs. Blind, I am sorry to disturb you with this, but I know you will help me understand some things."

"Oh, of course. What can I help you with?" she responds.

Ms. Nia begins, "Well, I have looked over the unit on the discovery of America, and the information presented is a very lukewarm version of the truth. The information makes derogatory comments about the indigenous people. I do not see any type of American Indian perspective at all. I am very disappointed with this part of the curriculum. On top of this, I tried to talk with my grade level, and they just don't understand."

After listening, Mrs. Blind responds with a reminiscent smile on her face. "Well, I understand your point and you are right, but this is your first year. You need to get your teaching methods down and continue to get hold of why you're here first. You are here to teach. Many first-year teachers want to conquer the world. You are just going through the adjustment of being an idealist to becoming a realist. We've tested our educational program and find it to be very effective."

Frustrated, Ms. Nia counters, "Our social studies curriculum discusses nothing about multiculturalism. Yet, it also says nothing about advancing only Christopher Columbus' viewpoint."

Mrs. Blind responds, "We have a very competent group of fifth-grade teachers. I suggest you work with them to see what type of agreement you can come to. If you can't work something out, I will intervene."

Defeated and distressed, Ms. Nia says, "Thank you" and walks out thinking, "I suppose they will want me to glamorize life on the plantation for slaves too!"

Ms. Nia feels defeated. She is no longer the enthusiastic, creative teacher who applied for a teaching position and entered her profession ready to take on the world. She thinks back to the teaching atmosphere she believed she was entering, an atmosphere focused on progressive, multicultural, student-centered teaching. As a novice teacher, she now weighs her responsibilities as an educator. If these children are going to be taught in a question-provoking, multicultural way, it is going to be her responsibility to provide a more holistic unit on the "Discovery of America."

DISCUSSION GUIDES

SUGGESTED PROCEDURES FOR CONDUCTING CASE STUDY DISCUSSIONS

BY DR. RONALD E. DISS AND EDGAR H. THOMPSON

We encourage discussion leaders to review the following general instructional procedures and then to read the discussion guides written specifically for each case in order to organize a discussion plan suited to their particular circumstances.

1. Distribute a copy of the case along with a Wait Sheet (See Appendix A) to each participant. Tell the participants to read the case and then write a brief reaction to it and at least one question they have. Explain that the Wait Sheet also contains space for them to jot down ideas as they think of them during the discussion, so they won't forget to contribute these notions later during the discussion when the opportunity presents itself. This reading and question-formation phase should take about 12 minutes to complete.

2. Before beginning the actual discussion of the case, ask the participants to share the questions they wrote on their Wait Sheet with each other in pairs or in small groups near where they are sitting. As the discussion leader, you should make no comment on what they say at this point. The purpose of this step is to help the participants become comfortable with the idea of sharing and responding. This phase should take about three minutes.

3. Begin discussing the case with the whole group, using from the discussion guide the Probes listed under each of the four categories (**Actors**, **Issues**, **Problems/Conflicts**, and **Solutions**). We suggest that discussion leaders list the four categories on a chalk board or flip chart at the beginning of the discussion. As the discussion unfolds, participants' comments can be written under each of these categories as each is discussed. Doing this will help participants keep track visually of the discussion as it proceeds.

4. Have participants wear name tags with their first names clearly visible and call on them by name. Doing this will allow you to move the discussion along at a smooth pace. [**Caution**: Do remember that some cases won't necessarily lead to animated discussions. Participants may need to think carefully about the case and what they hear others saying; as a result, they may be hesitant to blurt out comments due to intense concentration. Provide sufficient "wait time."]

5. Near the end of the discussion, ask participants if they have any remaining ideas listed on their Wait Sheets that they would like to contribute to the discussion.

6. At the conclusion of the discussion, ask participants to summarize (either orally, in writing, or both) the key concepts and details they remember from the case. You may wish to ask participants to respond in writing to the Assignment Questions given at the end of each discussion guide.

CASE 1: LEARNING ABOUT PROFESSIONAL BEHAVIOR DISCUSSION GUIDE

Potential Discussion Issues: Professional Behavior; Communication; Expectations; Monitoring; Procedural Guides

I. *Introduction*

Future teachers must learn and exhibit professional behavior. Aspiring teachers must learn many things about the culture of schools and the expectations of students, parents, colleagues and the community at large in order to demonstrate appropriate behavior. This is particularly true when schools are under fire and when the professional conduct of teachers and the teaching profession in general are under such intense public scrutiny. Most teachers would agree that certain universal standards for professional behavior do exist; however, learning and demonstrating these behaviors are not easy tasks. The central issues in this case are important to those students aspiring to become professional educators.

II. *Suggested Question Outline*

Actors

A. Using one, two, or three-word descriptive phrases, how would you characterize Polly, Mrs. Rivers, Mr. Jones and Dr. Linkous? [List each person's name on the board, leaving space to list descriptors given for each actor.]

Probes:

1. How do you think each of the actors in this case feels?
2. Is Mrs. Rivers presenting a reasonable account of Polly's behavior?
3. Does Mr. Jones have an accurate understanding of Mrs. Rivers? Polly?

Issues

A. What is the major issue in this case? What professional standards appear to have been violated in this case?

Probes:

1. Who violated what professional standards? How?
2. How was Polly given (or denied) adequate support to develop and behave professionally?
3. Who is responsible for Polly's professional behavior?

B. Why does Polly make the claim that she is a "victim?" Is her claim justified? Why, or why not?

Probes:

1. Is Mrs. Rivers' perception that Polly is irresponsible justified?
2. How might the behaviors of others have contributed to Polly's conflict?
3. Is Polly's request for a reassignment justified?
4. How would you describe the quality of communication taking place in this case?

C. What other issues emerge in this case?

Probes:

1. Why did Dr. Linkous react as she did to Mr. Jones' complaint?

2. If Dr. Linkous reassigns Polly to another school, what impact could this potentially have on Polly? What impact could a reassignment potentially have on the college's relationship with Mrs. Rivers, Mr. Jones, the school generally?

Problems/Conflicts

A. The purpose is to get participants to articulate perceptions of specific problems/conflicts which emerge from the case.

Try to get participants to respond in one or two-word phrases. List responses without comment on the board as they are given. Once all responses are listed it may be necessary to organize them into "primary" and "secondary" sub-categories. By so doing, participants may more easily generate workable solutions.

Solutions

A. How could the problems in this case have been avoided? If you had been one of the actors in this case, what would you have done differently?

Probes:

1. What could Mrs. Rivers do to get Polly to comply?
2. What could Polly do to remedy her negative feelings after her initial treatment at the school?
3. What could Polly do about being "held over" in her college class?
4. Could some conflict be avoided if Mrs. Rivers spoke to Dr. Linkous about Polly's behavior before she spoke to Mr. Jones?
5. How could better communications lessen some of the conflict in this case?

III. *Assignment Questions (Optional)*

Discussion Leaders may invite participants to reflect and produce a written response to the following questions:

A. What does the term "professional behavior" mean to you?

B. How is professional behavior learned?

C. Describe an event which you recently experienced during one of your school visitations in which a teacher displayed exemplary professional behavior.

CASE 2: DISILLUSIONMENT ABOUT TEACHING
DISCUSSION GUIDE

Potential Discussion Issues: Teaching Behaviors; Attitudes; Professional Roles; Confidentiality; Hazing; Communication.

I. *Introduction*

In most teacher preparation programs at least one preservice teacher comes into contact with a teacher who, for whatever reason, discourages preservice teachers from entering the teaching profession. This situation can be very distressing to an idealistic person who wants to go into teaching for all the right reasons. This case is designed to help pre-service teachers confront the possibility of having to deal with such behavior from veteran teachers, help them analyze the possible causes of this recurring phenomena, and prepare them to deal with these negative situations in positive, productive ways.

II. *Suggested Question Outline*

Actors

A. How does Karla see her problem?

Probes:

1. What does teaching mean to Karla?
2. What does teaching mean to Mrs. Crump?
3. Does Karla see the principal as an educator? Is her perception accurate?
4. Does Karla see the guidance counselor as an educator? Is her perception accurate?
5. Why is she so shocked about Mrs. Crump's attitude?

B. How has experience altered or changed Mrs. Crump??

Probes:

1. Has Mrs. Crump's beliefs made her a better teacher or a bitter one?
2. How much of her negative attitude is real, as opposed to staged to shock some reality into Karla?
3. To what degree is Mrs. Crump's perception of teaching more accurate than Karla's?

C. What role do administrative figures play in this situation?

Probes:

1. Does the principal make matters better or worse for Karla? How so?
2. From the principal's perspective, to what degree is Karla on target with her assessment of the situation? To what degree is she unrealistic?
3. Does the guidance counselor's assistance make matters better or worse? How so?
4. From the guidance counselor's perspective, to what degree is Karla on target with her assessment of the situation? To what degree is she unrealistic?

Issues

A. What's going on in this case?

Probes:

1. Who is responsible for seeing that Karla has a positive experience during her field placement?
2. How should school faculties be prepared to receive preservice teachers?
3. Given the inexperience and vulnerability of most preservice teachers, how can they best learn to deal with the variety of professional attitudes which are commonly displayed by teachers?
4. How can preservice teachers best learn to deal with issues of trust and confidentiality in matters involving colleagues?

Problems/Conflicts

A. The purpose is to get participants to articulate perceptions of specific problems/conflicts which emerged from the case.

Try to get participants to respond in one or two-word phrases. List responses without comment on the board as they are given. Once all responses are listed it may be necessary to organize them into "primary" and "secondary" subcategories. By so doing, participants may more easily generate workable solutions.

Solutions

A. What can be done to make Karla's situation better?

Probes:

1. What can Dr. Suzanne say or do to improve Karla's situation?
2. How can a small group of Karla's peers be used to help Karla deal with the discrepancy between what she believes, what she is being taught by professors at the college, and what she is actually finding in schools?
3. What actions can the college education department take in the future that would prevent what happened to Karla from happening to other students?
4. What can Karla do to make her situation better?
5. What can Mrs. Crump do to make the situation better?
6. What can the principal do to make the situation better?
7. What can the guidance counselor do to make the situation better?
8. What can Dr. Suzanne do to prevent Karla's now "bad" attitude from affecting Karla's peers?
9. What can Dr. Suzanne do to lead students beyond this crisis?

B. How could this problem be avoided?

Probes:

1. How can Karla "steel' herself against negative attitudes of the kind exhibited by Mrs. Crump?
2. What can Dr. Suzanne and the college do to prevent this situation from happening again?
3. Will sharing experiences with others solve the discrepancy between what we hope to find in schools and what is actually happening there?

III. *Assignment Questions (Optional)*

Discussion leaders may invite participants to reflect and produce a written response to the following questions:

A. What kinds of things can Karla say to Mrs. Crump to open up a more positive line of communication?

B. How can Dr. Suzanne keep such situations from being so upsetting to students?

CASE 3: EXPERIENCING PEDAGOGICAL CONFLICT DISCUSSION GUIDE

Potential Discussion Issues: Communication; Roles & Responsibilities; Problems Associated With Collaboration; Parental Concerns.

I. *Introduction*

It is a common experience for education students to contrast and compare their observations of what teachers do in classrooms to pedagogical tenets being learned in their college teacher preparation classes. During early field experiences, education students are often invited to collaborate with the classroom teacher in the delivery of instruction, sometimes causing pedagogical conflicts. When conflicts are anticipated and discussed, they may become meaningful sources of professional development and growth for both preservice and classroom teachers. If left alone, these same conflicts may become sources of confusion and disharmony resulting in the loss of significant learning opportunities for everyone involved. Such disharmony can also spill over into the community, negatively affect home-school relations, and add unnecessary strain to aspiring teachers.

II. *Suggested Question Outline*

Actors

A. Using one, two, or three-word descriptive phrases, how would you characterize Mrs. Louis, Tia, Joanie, Mrs. Blevins, Mrs. Spicer? [List each actor's name on the board, leaving space to list descriptors given for each actor.]

Probes:

1. How do you think each of the actors in this case feels?
2. What do you think Tia's motive was for giving Joanie the advice she gave?
3. What do you think Mrs. Louis's motive was for contradicting Tia?
4. Is Mrs. Blevins over reacting to Joanie's "confusion" by complaining directly to the principal?
5. What does Mrs. Blevins think of Mrs. Louis as a teacher? Is she pleased? Is she supportive?
6. What does Joanie think of Mrs. Louis? Tia?
7. Why is Joanie afraid to return to school?

Issues

A. What are the issues in this case?

Probes:

1. Is Tia "stepping out of bounds" by giving Joanie the advice she gives?
2. What are Mrs. Louis' beliefs about learning to write? What are Tia's beliefs about learning to write?
3. Who is responsible for teaching writing to Joanie?
4. Who is responsible for assigning a grade to Joanie's work?
5. What is the status/role of preservice teachers in early field experience schools?

6. To whom should parents voice their concerns and complaints about their child's education?
7. Is Tia being put in an "unreasonable spot" by Mrs. Louis?
8. Mrs. Blevins asked, "How could something like this have happened?" What do you think?
9. What other issues emerge from this case?

Problems/Conflicts

A. The purpose is to get participants to articulate perceptions of specific problems/conflicts which emerge from the case.

Try to get participants to respond in one or two-word phrases. List responses without comment on the board as they are given. Once all responses are listed it may be necessary to organize them into "primary" and "secondary" subcategories. By so doing, participants may more easily generate workable solutions.

Solutions

A. How could the problems in this case have been avoided?

Probes:

1. Do you think both Mrs. Louis and Tia had a clear understanding regarding Tia's status/role in Mrs. Lewis' classroom?
2. Whose responsibility do you think it is to see that expectations are clearly understood by both early field experience students and school personnel?
3. Was Tia's assignment to Mrs. Louis' classroom a poor one?
4. Could personnel from the college or school do anything to close the gap between the way Mrs. Lewis and Tia react to Joanie's writing?

B. What could be done to remedy the problems presented in this case?

Probes:

1. Do you think it would be a good idea for the principal to bring Mrs. Lewis, Tia and Mrs. Blevins together to address Mrs. Blevins' concerns?
2. Should Tia continue working in Mrs. Louis' classroom?
3. Should Tia change her way of teaching writing to accommodate Mrs. Louis' expectations? Why? Why not?
4. What should be said to Joanie? Who should speak to her?
5. If you were Tia, what would you learn from this case?

III. *Assignment Questions [Optional]*

Discussion Leaders may invite participants to reflect and produce a written response to the following questions:

A. Pretend you are Mrs. Spicer, the principal. How will you respond to Mrs. Blevins? Will you offer professional support of Mrs. Louis? Is Tia entitled to professional support from the principal?

B. What does this case teach the preservice teacher about the dynamics of home and school?

CASE 4: CONTROVERSIAL TEACHER DISCUSSION GUIDE

Potential Discussion Issues: Decision Making; Good Teaching Behaviors; Lesson Planning.

I. *Introduction*

Teacher educators universally want to place their pre-service teachers with experienced teachers who will model the kind of good teaching behaviors they should be emulating. Problems can and do arise, however, when pre-service teachers are placed in classrooms with exceptionally creative and gifted teachers. Teachers in training often find it difficult initially to emulate these teachers. The behaviors in this case look deceptively simple to accomplish but in fact only work because the model teacher has internalized a complex set of procedures not evident to inexperienced teachers in training. The result of a situation such as this one is that teachers in training can be unintentionally misled. The main purpose of this case is to sensitize teachers in training to the potential complexities in what appears to be simple instructional procedures and to prepare them not to be unintentionally misled.

II. *Suggested Question Outline*

Actors

A. Using one, two, or three-word descriptive phrases, how would you characterize Dr. Young, Mr. Hemp, Roberta, Jennifer, and Mr. Randall? [List each person's name on the board, leaving space to list descriptors given for each actor.]

Probes:

1. If a teacher in training sees a teacher getting results, why shouldn't students want to mimic such a teacher's approach to teaching?
2. What criteria can teachers in training use to differentiate between what an experienced teacher can do and what they can't do?
3. Shouldn't a teacher in training be critical of any teaching practice that doesn't fit the norm? Explain.

B. Using two or three-word descriptive phrases, list what we know about the teacher in this case.

Probes:

1. Should experienced teachers, who know full well that teachers in training will follow their lead, model behaviors they know new teachers are not yet capable of doing?
2. Does Mr. Randall understand that what works for him may be absolutely wrong for beginning teachers?

Issues

A. What are the issues in this case?

Probes:

1. Is Mr. Randall intentionally or unintentionally misleading teachers in training? How do

you know one way or the other for sure?

2. How is Mr. Randall managing the class, since he says he has no prepared discipline plan?

Problems/Conflicts

A. The purpose is to get participants to articulate perceptions of specific problems/conflicts which emerge from the case.

Try to get participants to respond in one or two-word phrases. List responses without comment on the board as they are given. Once all responses are listed it may be necessary to organize them into "primary" and "secondary" subcategories. By so doing, participants may more easily generate workable solutions.

Solutions

How could the problems in this case be avoided?

Probes:

1. What can the college do to prevent students from being unintentionally misled?
2. What can Mr. Randall do to keep teachers in training from being misled?
3. Should the college avoid placing teachers in training with controversial teachers because these teachers don't fit the standard mold?
4. Are students really at risk when they attempt to emulate effective, yet atypical, teachers? If so, in what ways?

What can be done to remedy the problem(s) presented in this case?

Probes:

1. How should the college structure its seminars for teachers in training so that students can fairly and critically evaluate Mr. Randall's performance as a teacher in comparison to how they hope to approach teaching?
2. Will a restructuring of seminars alone take care of the problem? Why or why not?
3. How can teachers in training be given the opportunity to try some of Mr. Randall's techniques in a safe and nurturing environment?

III. *Assignment Questions (Optional)*

Discussion leaders may invite participants to reflect and produce a written response to the following questions:

A. Is it wise for a teacher in training to mimic the behavior of an experienced teacher?

B. Should teacher preparation programs protect their teachers in training from skillful, yet controversial, teachers?

C. How can teachers in training protect themselves from negative models without cutting themselves off from learning about significant new ways to teach?

CASE 5: ETHICAL, LEGAL AND PROFESSIONAL RESPONSIBILITIES OF A PRESERVICE TEACHER DISCUSSION GUIDE

Potential Discussion Issues: Professional responsibilities of preservice teachers; Ethics; School as an organization; Adolescent development; Working with teachers and administrators; Legal issues; Decision-making; Rights of students.

I. *Introduction*

Zachary's case presents legal ramifications for the students, the preservice teacher, the teacher, the school, and the college. The student's right to free speech (i.e., the obscene newsletter) is limited within the public school domain. Other players in this case have responsibilities to uphold legal guidelines established for the school, including those stated policies in the student handbook. These restrictions are valid as long as the players accept their respective roles in regard to the school.

Though relationships with students are complex, preservice teachers have some initial ideas about possible types of interactions with the students. However, preservice teachers may find it more difficult to characterize the appropriate nature of relationships with teachers, administrators, and college faculty.

The preservice teacher usually sees the authoritarian aspect of the interactions with teachers, administrators, and college faculty. Depending on the accessibility and leadership styles of these persons, the preservice teacher may benefit from their guidance. However, the preservice teacher must also independently discover and fulfill many of the demands of the preservice teaching professional. Zachary's case illustrates the struggles in attaining this balance.

II. *Suggested Question Outline*

Actors

A. Using one, two, or three-word descriptive phrases, how would you characterize: Zachary, Chuck, Dr. Miller, Dr. Glenn, and Ms. Hamner.

Probes:

1. How do you think each of the actors in this case feels?
2. What are the dynamics that dominate the relationships between Zachary and Ms. Hamner, Dr. Miller and Zachary, Ms. Hamner and Dr. Glenn, and Dr. Miller and Dr. Glenn?

Issues

A. What is the main issue in this case? What professional standards, if any, appear to have been violated?

Probes:

1. What professional standard was violated, and by whom?
2. How was Zachary given (or denied) adequate support to develop and behave professionally?
3. Who is responsible for Zachary's professional behavior?

B. Where should Zachary's responsibilities and loyalties rest?

Probes:

1. Should Zachary be loyal to the student, the school, the college, or himself? Why or why not?

2. How might the behaviors of others have contributed to Zachary's dilemma?
3. How would you describe the quality of communication taking place in this case?

C. Issues result when schools and colleges collaborate. Where do the responsibilities for preservice teachers rest?

Problems/Conflicts

A. The purpose is to get participants to articulate perceptions of specific problems/conflicts which emerged from the case.

Try to get participants to respond in one or two-word phrases. List responses without comment on the board as they are given. Once all responses are listed it may be necessary to organize them into "primary" and "secondary" subcategories. By so doing, participants may more easily generate workable solutions.

Solutions

A. How could the problems in this case have been avoided? If you had been one of the actors in this case what would you have done differently?

Probes:

1. What might Ms. Hamner do to enhance her relationship with Zachary?
2. What might Zachary do to establish his relationship in the classroom?
3. What might Dr. Miller do to facilitate Zachary experience?
4. What could Dr. Glenn do to ease the conflict?
5. How could better communication lessen some of the conflict in this case?

B. Has Zachary created this dilemma for himself? Why or why not?

C. What might Zachary have done differently?

Probes:

1. Could he confront Chuck directly about the newsletter?
2. Could he share the newsletter with Ms. Hamner?
3. Could he have just ignored the newsletter and not tell anyone?
4. What might Zachary do to balance his sense of loyalty to the school and to the student?
5. When he shared the newsletter with Dr. Miller, did he betray the trust Chuck had in him?
6. How could Zachary justify his belief in free speech and the restrictions imposed on this right for high school students?

D. To what extent do Zachary's relationships with Dr. Miller, Dr. Glenn, and Ms. Hamner respectively influence his dilemma?

Probes:

1. How could these persons have been better resources for Zachary?
2. What responsibilities did these persons have to Zachary?
3. How could Zachary have been more professional in his relationships with these persons?

E. What social and political influences are impacting the restrictions on publications such as the student newsletter?

Probes:

1. Are the rights of students violated by these restrictions?
2. Are children/adolescents without rights in such situations?
3. How could similar restrictions impact supplemental materials a teacher might choose to use in the classroom?

F. How can teacher preparation programs and local public schools collaborate to prepare preservice teachers for these ethical, legal, and professional responsibilities?

G. How might this situation with Chuck influence Zachary's decision about pursuing the profession of teaching?

III. *Assignment Questions*

Discussion leaders may invite participants to reflect and produce a written response to the following questions:

A. What are Zachary's dilemmas?

B. If you were Zachary, how would you like to have been treated by Dr. Miller, Dr. Glenn, and Ms. Hamner?

C. How would you have resolved Zachary's dilemmas?

D. Select a topic related to this case to research and report on, reflecting on this case as an example:

1. Legal issues and responsibilities in preservice education;
2. Moral responsibility, education and the preservice teacher; and
3. Age, position, and loyalty: the dilemma of the preservice teacher.

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CASE 6: A STUDY IN MULTICULTURAL EDUCATION: WILMA KENNEDY DISCUSSION GUIDE

Potential Discussion Issues: Communications in procedural reporting; Safety policy; Liability; Psycho-social development; Parental careers; Educational leadership.

I. *Introduction*

This case demonstrates the importance and contribution of perspective to the successful analysis of a situation. The varied perspectives in this case provide an opportunity to ferret out the critical facts.

Issues central to this case include pool safety rules and policies, David's psycho-social development, legal liability, and communication and reporting procedures. The pool incident displays the need for safety regulations and policies which apply to both students and teachers. Also, not all eleven year-old boys are created equally. Parents and teachers often view situations differently. Here we have an example of the fact that the complexity of our perceptions and of our behaviors influences outcomes. The described situation also raises liability issues. Does the parent have the grounds for a law suit? Did Tony's apology imply guilt? What was Mrs. Smith's role in this incident? The final issue is lack of communication in reporting procedures. The case discussion should focus on how communication or lack of communication between school personnel affected this situation.

II. *Suggested Question Outline*

Actors

A. In what order did the events occur? Trace 1) David's actions, 2) Tony's actions, and 3) Mrs. Kennedy's actions.

B. How does Mrs. Kennedy see this situation?

Probes:

1. What does Mrs. Kennedy know first-hand about the incident?
2. What actions could Mrs. Kennedy have taken to prepare better for the conference with the Wood's family?
3. What does Mrs. Kennedy see as the key issues?
   (a) Legal
   (b) Procedural
   (c) Other
4. What was Mrs. Smith's role in this incident?

C. How might the situation be viewed from a student teacher's perspective?

Probes:

1. What would you expect the cooperating teacher to do?
2. What would you expect the principal to do?
3. What would you do if you were Mr. Taylor?

Issues

A. What are the major issues in this case?

Probes:

1. How did David's developmental levels contribute to the dynamics of this situation?

2. How did David's family's perspective of sports and athletics affect their response to David's story and Mr. Taylor's physical characteristics?
3. How did David's psycho-social development affect his perception of the teasing of his classmates?
4. Should Tony, knowing David's limitations, have included him, upon request, as an equal in the intense play with the other boys?
5. How does anyone integrate a person of lesser skills into an activity with persons of greater ability without setting up a liability and safety situation?

B. Does David's ethnicity contribute to his family's response in any way?

C. Do rules differ between instructive and recreative settings?

Problems/Conflicts

A. The purpose is to get participants to articulate perceptions of specific problems/conflicts which emerge from the case.

Try to get participants to respond in one or two-word phrases. List responses without comment on the board as they are given. Once all responses are listed it may be necessary to organize them into "primary" and "secondary" subcategories. By so doing, participants may more easily generate workable solutions.

Solutions

A. What might Mrs. Kennedy do?

Probes:

1. Should additional policies and procedures be formulated and implemented to prevent similar future incidents? What should they be?
2. Should Mrs. Kennedy inform the Woods family that Mrs. Smith verified Tony's story?
3. Should she reprimand Tony in any way? Why? How?
4. Should Mrs. Kennedy discuss this situation with the University supervisor? Why?
5. Should Mrs. Kennedy have delayed the conference with Ms. Wood until she had all of the information?

B. What might Tony have done?

Probes:

1. How could Tony have more successfully integrated David into this play?
2. Should Tony have discussed this situation with Mrs. Smith after he heard of David's threat?
3. Should Mrs. Smith have reported the incident to Mrs. Kennedy prior to leaving the school for a conference?

III. *Assignment Questions*

Discussion leaders may invite participants to reflect and produce a written response to the following questions:

A. Identify the appropriate safety rules, policies, and regulations for both instructional and recreational pool activities, and support your argument.

B. Identify the insights you have gained from this case which will help you in your student teaching.

C. What are the pertinent psycho-social and physical characteristics of pre-adolescent males influencing this case?

D. In this case, state your views on the role ethnicity plays in regard to academic and physical achievement of pre-adolescent boys.

E. What is the relationship between lesson planning and liability?

CASE 7: A STUDY IN MULTICULTURAL EDUCATION: ANGELA ARMSTRONG DISCUSSION GUIDE

Potential Discussion Issues:
Social Interaction with peer group; Cultural stereotyping; Teacher reaction to parental pressure; Cultural diversity; Gifted children.

I. *Introduction*

This case provides an opportunity to discuss at least four interrelated topics: cultural stereotyping, parental pressure on teachers, home environment, and social problems for identified gifted children. The case also demonstrates the importance of identifying the cause or causes of inappropriate behavior patterns before trying to change the behavior. All of the parties involved must view the behavior as problematic before any effective changes in the behavior can be made. It is also essential that cultural factors within the family be carefully considered.

Cultural stereotyping is a very sensitive issue. The teacher must be very careful in dealing with this topic. Studies have shown that math students in the United States do not compare favorably with their counterparts in other countries. Students in Asian countries rank much higher in math achievement than those in the Unites States.

In addition, cultural factors and family values may cause a parent to place greater emphasis on academic achievement rather than the social skills which may be deemed more appropriate by mainstream society. A child in this situation is faced with the very difficult problem of trying to function within the family group while also trying to be a part of a society that is very different from that at home.

Cultural issues and family values play a significant role in the way people behave and the way in which they view the behavior of others. It may be necessary to provide the group with some background information regarding values and social customs in Asian families.

Finally, be sure to consider carefully interrelationships of family members as well as those between the parents and teacher. These may influence the manner in which the child interacts in the classroom setting. Knowledge of and sensitivity to the pressures felt by student and teacher must be considered in evaluating the child's behavior.

II. *Suggested Question Outline*

Actors

A. How does Wang view the problem?

Probes:

1. Does he view his isolation as a problem?
2. Does he feel rejected socially?
3. Does he understand the effect his attitude and behavior might be having on others?

B. Is it a problem for Mrs. Armstrong? How does she perceive her role in the situation?

Probes:

1. Does Mrs. Armstrong see Wang's social difficulties as a problem?

2. How does her behavior affect on his situation?
3. How does her relationship with the mother affect the situation?

C. How does Wang's mother view the situation? How does she perceive her role in the situation?

Probes:

1. Does Wang's mother view his isolation as a problem?
2. How does her attitude relate to his behavior?
3. What effect does her value system have on Wang and on the classroom teaching?

D. Is there a problem for Wang's classmates? How do they perceive their roles in the situation?

Issues

A. How do the varying perceptions of the problem influence efforts to change the various behaviors?

B. How does Wang's self-concept affect the way other students treat him and the way he responds to their treatment?

Probes:

1. Does being identified as an academically "gifted" student influence Wang's behavior? In what ways?
2. Does Mrs. Armstrong's treatment of Wang influence his behavior?
3. Does Wang's mother's behavior put pressure on Wang to act in certain ways?
4. Does Wang's ethnic background play a role in his behavior? If so, what?

C. How does Mrs. Armstrong's view of Wang and his mother influence her behavior?

Probes:

1. Is it appropriate for teachers to ask bright students to "help" other students? If so, when and under what circumstances? If not, why not?
2. Does Dr. Ho place unnecessary pressure on Mrs. Armstrong? If so, in what way?

D. How do Dr. Ho's own needs and own self-concept influence the way in which she relates to Wang and to Mrs. Armstrong?

E. What impact does this situation have on the other students in Mrs. Armstrong's class?

Probes:

1. How might their views be affected by Mrs. Armstrong's behavior? By Wang's behavior?

Problems/Conflicts

A. The purpose is to get participants to articulate perceptions of specific problems/conflicts which emerge from the case.

Try to get participants to respond in one or two-word phrases. List responses without comment on the board as they are given. Once all responses are listed it may be necessary to organize them into "primary" and "secondary" subcategories. By so doing, participants may more easily generate workable solutions.

Solutions

1. As the teacher, how would you help Wang to understand and deal with the situation?
2. What advice would you offer Mrs. Armstrong with regard to how her behavior may be effecting the situation, e.g., contact school counselor, work with Wang's mother, work with the entire class?
3. How would you approach Dr. Ho in trying to help her to understand and deal with the situation?
4. What kinds of things would you, as a teacher, do to help other students in your class to better understand and deal with the situation?

III. *Assignment Questions*

Discussion leaders may invite participants to reflect and produce a written response to the following questions:

A. Research and list cultural factors which may directly or indirectly play a role in this situation.

B. How does ethnicity effect the social interaction of teachers/students/parents?

C. How far should the teacher go in becoming involved in social interactions outside of the school environment?

D. What data is available regarding the social-emotional development of children identified as intellectually gifted in comparison to their chronological peers?

E. How does parental pressure on teachers carry over into the classroom setting?

F. Identify the insights you have gained from this case which will help you in your student teaching.

CASE 8: A STUDY IN MULTICULTURAL EDUCATION: ADELE DAVIDSON DISCUSSION GUIDE

Potential discussion:
Ethnicity; Developmental learning theory; Behavior learning theory; Behavior management; Climate; Support.

I. *Introduction*

There is a cry from a lost people--our students. This cry is heard day after day, month after month, year after year, decade after decade. It is becoming stronger, urgent, and more persistent, as time passes. Unfortunately, we have long overlooked, rationalized, and ignored the cry.

This case deals with some of the crucial issues that precipitate and negate that cry. To find the core of this myriad of issues would be superfluous, since the student's behavior in this case cannot be labeled symptom or cause.

Here, we must specifically look at the African-American male child, a child who faces an increased death rate due to black on black crime, drugs, and gang wars. Schools must meet the needs of these children who lead diverse and complex lives. We must begin to teach the whole child and meet not only their academic, but also their social, emotional, psychological, and physical needs.

Problems in the environment, home, and family are escalating. We must create school systems that lead to success for African-American males. This child must grow with his environment to satisfy his basic needs and to develop competence in dealing with people, things, and events.

In discussing this case, focus on the behavior of the student. It cannot be overlooked. To understand the eroding of the system fully, examine all the issues involved closely. One day students may encounter the same issues. Here, through discussion, problem solving, and critical thinking, they can approach the problem in a clear and unbiased manner. There may not be a right or wrong answer, admittedly, but discussion should evoke a platform for change.

The teacher in this case finds herself in a situation that is becoming more and more common. What should she do? As we witness yet another young African-American male who cannot read, who is functioning well below grade level, and who has no control over his behavior, an alarm must sound. Yet, too often this child is swept through the system, destined to remain illiterate! In this case the teacher's concern for her student is evident. Where is her support?

II. *Suggested Question Outline*

Actors

A. Using one, two or three-word descriptive phrases, how would you characterize Keenan, Mrs. Davidson, Mrs. L?

Probes:

1. Why did Keenan not continue in a public school setting?
2. What behaviors is Keenan exhibiting? Under what conditions?

3. What do we know about his homelife? How should we treat that information?
4. Describe Keenan's performance so far in the third grade.
5. What are his abilities and deficits?

B. How does Mrs. Davidson see the problem?

Probes:

1. What does Mrs. Davidson observe happening consistently when she teaches/reviews a lesson?
2. Characterize Mrs. Davidson's interactions with students and the way she views her classroom.
3. What does Mrs. Davidson know about the student that can give us an insight into his character?

Issues

A. What problems might the principal's impromptu visit manifest for Mrs. Davidson?

1. How does the principal's input in this matter affect the situation?
2. What responsibilities, legal and procedural, fall to the administration in this case?

B. How does ethnicity affect performance?

Probes:

1. Describe the association Keenan has made between skin color and attitude.
2. Should Mrs. Davidson have continued to reinforce (to Keenan) the fact that she is black, just light-skinned?
3. Is there still racial prejudice lingering in the classroom?

C. What is the impact of the environment from the perspective of the child?

Probes:

1. How have Keenan's prior experiences influenced his classroom performance?
2. What role do Keenan's significant others play in his life? How have they affected his emotional and social growth?

D. How does Keenan's outburst affect the climate within the classroom?

1. Should Mrs. Davidson have ignored many of the behaviors she witnessed from Keenan?
2. What should Mrs. Davidson do differently to alleviate the negative behavior and outbursts?
3. How has Keenan's overall development been stifled?
4. How does Keenan's socio-emotional development affect the situation?
5. Is Keenan a candidate for special education services?

E. Is the classroom environment conducive to learning?

1. Is Mrs. Davidson's attitude toward her students appropriate? To Keenan?
2. Do you feel she has the necessary skills and competencies to work with Keenan?
3. What do you think of Mrs. Davidson's responses in class?
4. Should Mrs. Davidson have handled the hitting incident differently? If so, how?

Problems/Conflicts

A. The purpose is to get participants to articulate perceptions of specific problems/conflicts which emerge from the case.

Try to get participants to respond in one or two-word phrases. List responses without comment on the board as they are given. Once all responses are listed it may be necessary to organize them into "primary" and "secondary" subcategories. By so doing, participants may more easily generate workable solutions.

Solutions

A. How could the problems in this case have been avoided? If you were one of the actors what would you have done?

Probes:

1. How should Mrs. Davidson handle the situation with her principal so that it benefits all parties involved?
2. What do you think can better prepare Mrs. Davidson to meet the daily demands from Keenan and of today's youth, in general?
3. What can Mrs. Davidson do to better deal with the situation she is confronted with daily in her classroom?

III. *Assignment Questions*

Discussion leaders may invite participants to reflect and produce a written response to the following questions:

A. What are Keenan's attitudes about school?

B. What suggestions would you make to Mrs. Davidson about what she might do in her class to enhance the possibilities of success for Keenan?

C. What should Mrs. Davidson recommend to all responsible adults involved?

CASE 9: A STUDY IN MULTICULTURAL EDUCATION: MS. M. B. NIA DISCUSSION GUIDE

Potential Discussion Issues: Integration of Multicultural perspectives within the Social Studies curriculum; Individual diversity amongst colleagues; Ethical role of the first year teacher.

I. *Introduction*

Three interrelated topics are investigated in this case. They are the integration of multicultural perspectives into the social studies curriculum, dealing with individual diversity among colleagues, and the ethical role of the first year teacher.

Ms. Nia is faced with a social studies unit that does not realistically portray a vital part of American history, the "Discovery of America." The text focuses on the Spanish viewpoint. An American Indian viewpoint is lacking.

Multiculturalism is a very old concept. Since integration, and even before, the public school system has had a responsibility to teach all children from different backgrounds and ethnicities. Should Ms. Nia be concerned about this situation? She has been ridiculed and her cause has been belittled, leaving her in a state of despair and isolation.

This leads to the issue of attitudes toward individual diversity among colleagues. In the educational workplace, teachers generally are free to exercise their own teaching styles and processes. This is heavily influenced by the other teachers' attitudes towards their new colleague, which may be damaging to their working relationship. This issue is directly tied in to Ms. Nia as an individual. She feels her values and morals are not being respected, which will not help to foster a healthy working relationship. This is especially critical in a "team teaching" situation.

A first-year teacher has little experience to draw from. Often, many of the studies and theories presented in college cannot be directly applied in the trial and error process new teachers engage in to create their own educational program. Local issues of classroom management, content, and paperwork must be considered and made workable. A first-year teacher must learn to separate emotions from duties/responsibilities; this ability is learned with experience and can make a situation such as Ms. Nia's very difficult to manage.

This social studies case study is rich with conflicts in culture and values. Ms. Nia's position is perceived as a personal one. Her viewpoint is invested in a multicultural perspective which has not yet been recognized by her particular school system. She stands alone and is looked upon as an idealist.

II. *Suggested Question Outline*

Actors

A. How does Ms. Nia see her problem?

Probes:

1. What does teaching mean to Ms. Nia?

2. What does teaching mean to her team colleagues?
3. What does teaching mean to Mrs. Blind (the principal)?
4. Does Ms. Nia see Mrs. Blind as an educator?

B. How do Ms. Nia's colleagues see this situation?

Probes:

1. Describe Ms. Nia's colleagues.
2. What issues does Ms. Nia present to this team?
3. What is their reaction to Ms. Nia?
4. What is Ms. Nia's reaction to the team members?
5. To what degree is the team's perception of teaching more accurate than Ms. Nia's?

C. What role do administrative figures play in this situation?

Probes:

1. Does the principal make matters better or worse for Ms. Nia?
2. From the principal's perspective, to what degree is Ms. Nia on target with her assessment of the situation? To what degree is she unrealistic?

Issues

A. The problem from Ms. Nia's perspective: It is crucial for those trying to interpret Ms. Nia's viewpoint to recognize her desire to teach all children a fuller, historical truth. Discuss the founding of America first from the Spanish perspective, from the Native American perspective, and from the story taught to you in school.

B. Collegial diversity: Here you want to investigate the role of the teacher as an individual. Explore the relationship of personal morals, values, and perspectives on teaching.

C. The first-year teacher: Discuss the services provided to this new teacher, including guidance and support to help her become a successful teacher.

Problems/Conflicts

A. The purpose is to get participants to articulate perceptions of specific problems/conflicts which emerge from the case.

Try to get participants to respond in one or two-word phrases. List responses without comment on the board as they are given. Once all responses are listed it may be necessary to organize them into "primary" and "secondary" subcategories. By so doing, participants may more easily generate workable solutions.

Solutions

A. What exactly is multicultural education?

Probes:

1. What benefits does such a program have for the children?
2. How have such programs affected the retention of skills, concepts, and motivation of the children.

B. How could Ms. Nia have handled her situation?

Probes:

1. Should her personal belief system be an issue at all?
2. Is her relationship with her colleagues severely damaged? Will she be labeled due to her "idealistic views?"

C. What is best for the children?

Probes:

1. How far are we to go with what is "the truth?"
2. Should parental views be considered in dealing with the needs of the children?
3. How do you handle parents who are irritated about the lack of multicultural information within the school system?

D. What messages are we sending to non-white children?

Probes:

1. Is the self-esteem of these children becoming more frail due to the lack of interest shown to their heritage and culture in classroom settings?
2. Would a greater appreciation of different cultures blossom from integrating more multicultural material in the elementary school setting?

III. *Assignment Questions*

Discussion leaders may invite participants to reflect and produce a written response to the following questions:

A. Research the different trends and methodologies in multicultural education. Compare and contrast the differences and similarities.

B. Place yourself in a similar situation. You become Ms. Nia and create a situation that would conflict with your belief system. How would you deal with the principal, colleagues, and your students?

C. Examine teaching materials and determine whether they are biased. Are many perspectives and ethnicities present?

D. Define multicultural education.

Appendix A

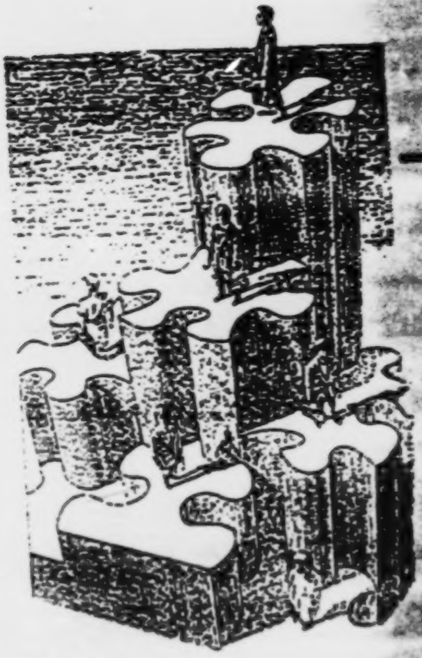
Wait Sheet

A. Upon completion of reading this case (and prior to group discussion), please write a brief response to the following:

1. My initial reaction to this case is:

2. A question I have about this case is:

B. As the group discusses the case, questions or ideas may come to you which you think are important to understanding the case. Use the space below or on the back to put these thoughts "on reserve" as a reminder to include them in the discussion.



CASE STUDIES

FOR

TEACHER TRAINING

AND

EDUCATIONAL LEADERSHIP

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PREFACE

Educational reform must be about planned change. Bringing about change in our educational system is a complex process. It requires an understanding of the systems which define our educational practice and within which our educational structures exist, an understanding of the role of the individual practitioner in interaction with the system, and multi-level intervention to accomplish lasting, system-wide change.

The Commonwealth Center for the Education of Teachers has been part of the multi-level educational reform process in Virginia. The Center has had, as part of its mission, an objective of enhancing the quality of preservice teacher education among all the teacher preparation programs in the Commonwealth. One strategy used in addressing this objective has been the minigrant competition to support (albeit minimal financial support) innovation in preparing new professionals. Another strategy supported by the Center has been the introduction and cultivation of the case study method in teacher preparation. These case studies represent the blending of the innovation of faculty in their active engagement in educational reform (i.e. the change process) with their ability to share, via their cases, their insights on such activity and challenge new professionals to be reform minded.

The case study method allows developing professionals, of all stages, to confront real-life problems. This method offers an opportunity for the development and refinement of those conceptual understandings, professional skills and attitudes needed to be a "teacher"--especially a teacher committed to the goals of the educational system in our society and to the profession: A teacher who sees him- or herself as a change agent.

The teacher as change agent must be able to identify the complexities of the system and critically analyze the essential components so as to be able to intervene effectively. These four case studies will challenge the reader to a greater understanding of the change process, present situations requiring analysis and creativity in developing strategies to address the situations, and offer an opportunity to reflect upon one's decisions and approaches. Effective systems-level intervention requires dealing with the content and the process simultaneously. It is this knowledge and set of skills that will allow each of us to be active, informed participants in the change process. The leadership necessary for lasting educational reform rests in all of us; leadership for effective planned change must come from the individual teacher as well as the defined administration and related services staff.

The cases that follow focus on educational change, collaboration, and reform. As educators, you will find them to be useful in informing us as we strive for a more comprehensive model of effective educational reform. Each case challenges us to think in a greater systems context, which, in turn, helps us develop as change agents.

The authors of the cases presented should be congratulated, first, for being active change agents in educational reform, and, second, for their skills in sharing their experience with us in an instructional context. Special thanks are also offered to Dr. Diane Foucar-Szocki, who directed the minigrant competition and has edited this collection, and Ms. Betty Garnett, whose time and talents were crucial in preparing the cases for publication.

A. Jerry Benson
Dean
College of Education and Psychology
James Madison University

INTRODUCTION

Education is a necessary and complex endeavor requiring constant examination of the roles, relationships and responsibilities of all involved. The cases presented here invite the reader to examine change within various educational settings including a state, a school division, a school and an individual teacher. Each case encourages the reader to explore the issues from many perspectives, recognizing that educational reform is a multi-faceted endeavor.

Dr. Charles Watson's case, Third Period We Have Life-Long Learning, is a snapshot of Virginia's attempt to articulate an outcomes-based framework for education throughout the Commonwealth. The case was written prior to the fateful September 15, 1993, announcement of Virginia's Governor Wilder that the Common Core of Learning was to be abandoned. This announcement halted several years of work by hundreds of people from throughout Virginia. Dr. Watson's case provides glimpses of how the Common Core was perceived and understood by several key constituencies. The case presents an opportunity to examine a large scale educational reform effort that ultimately met with failure. While the case does not directly address the demise of the Common Core, it does provide excellent background for those considering similar reforms. It reminds us that there is much to learn from both the successes and failures of others.

Dr. Phyllis Coulter's case, Moving Toward Developmental Literacy Assessment, documents the process of change at the District level. Here we have a successful three-year effort to broaden assessment practices and invole teachers, administrators, and university personnel in the process. The case details specifically the collaboration of the district language arts supervisor and a local college professor, highlighting personal and contextual circumstances which facilitated success. As this case exemplifies, successful reform is much more than mechanics.

Learning disabilities in childhood have long been a focus of education. In his case, TJ: Year Two: Starting All Over Again, Dr. Paul Gerber brings us face to face with the issues of learning disabilities in adulthood. TJ, a learning disabled adult, is in his second year of teaching in a learning disabilities resource class. This case allows for discussion of what it means to be a teacher, what it means to be a teacher with learning disabilities and more importantly, what it means to be a colleague, administrator or specialist to someone with learning disabilities. The case is an excellent teaching tool for those considering school administration, administration of special education or human resources.

Finally, Dr. Shirley Smith and Mr. Greg Tsoucalas provide record of a collaborative effort between parents, teachers, administrators and a teacher training institution to establish a math lab in a local elementary school. This case reminds us that teachers, parents and university administrators are all interested in providing quality education and creating meaningful, positive change in our schools. While we are all well-intended, we are not always clearly understood. This transcript of participant reflections provides insight into how we can better foster collaboration and overcome barriers of resistance and misunderstanding.

These cases are varied in their topics, format and style. Yet, taken together they provide a rich record of the process of educational change and reform. Because of their complexity, readers might want to read the case discussion guide prior to reading the case. This may focus the reader toward the important elements of each case. We hope you will find these cases useful in the preparation of teachers and administrators who increasingly face similar issues and must work with a multitude of constituencies to do the valuable work of education in America.

Case Study 1: Third Period We Have Life-Long Learning

by Dr. Charles R. Watson
James Madison University

Scattered and weak applause greeted the speaker from the Virginia State Department of Education as she finished her overview of Virginia's Common Core of Learning. The brief presentation covered the basics of the "Common Core," the reform proposal being recommended as the framework for public education through the year 2006. The 200 participants--educators, parents, legislators, business persons, and other interested individuals--attended the session at the invitation of the Superintendent of Education. He hoped the session would provide information and address concerns. The participants were assigned seats at large round tables to assure a broad mix of viewpoints. The groups were assigned two simple tasks: discuss the Common Core of Learning and list specific areas of concern, support, or confusion.

The group at Table 12 was fairly typical of the other tables in the hotel ballroom. Each person was wearing a tag with the person's name, home area, and professional position. The people at Table 12 were now glancing at one another's name tags. No one spoke until "Anne" said, "Let's reintroduce ourselves and then get started--I'm not sure I can stay all day, but I really don't want to miss anything. I'll start. I'm Anne Smith, and I am CEO of 'Jeans R Us.' I live in Fredricksburg, but we have stores scattered all through eastern Virginia." Anne looked to her left. The tall black man smiled and introduced himself. "I'm Sam Watson, principal of Washington High School in South Richmond." To his left, a middle-aged woman said, "I'm Mary Green; I teach third grade in Albemarle County. I've been teaching for nearly twenty years." To her left was a young black woman, professionally attired in a grey suit, who said, "I'm Beth Richards, and I'm a post-baccalaureate student at James Madison University and I'll be doing my middle school student teaching in the spring." The dark-haired man to her left, wearing a navy business suit, turned to her and said, "My son graduated from JMU in '91--we love the place. He was in the School of Business--JMU is a great school. I'm Mike Weber, senior Vice-President of Dribble Pharmaceutical. I live in Waynesboro." Making sure everyone was paying attention, the next person said, "I'm Terri James, and I am a special education teacher at Lincoln Middle School in Virginia Beach. Oh, yes, I've been there eight years now." The man seated next to her, appearing a bit out of place in his fishing tournament t-shirt and jeans, said in a firm voice, "I'm Joe Miller. I teach seventh grade math and science in Highland County. This is my tenth year of teaching. Before Highland, I taught in Charlottesville." The woman to his left, dressed in a navy business suit, responded, "What a mix we are! I'm Debra Willis, principal of Dooley Elementary School in Madison." The next woman, smartly dressed in a dark green suit, said quickly, "And I'm Ruth Palermo. I teach eleventh grade history in Fairfax County. Been there for sixteen years, and a day off from school this time of the year is really great!" Murmurs of agreement were heard around the table, and the next participant waited until the table was quiet before introducing herself. "I'm Sue Bland. I teach first grade in Norfolk. I've taught for eight years--lived my whole life in Norfolk, though."

As she finished, an uneasy quiet settled over the group. Anne said, "Well, we have about an hour left to talk about this stuff and to get to some issues and concerns. And frankly, I'm pretty pleased with what was said earlier, although I must admit that I first heard of the Common Core just last month when I received the invitation. It sounds as if this may change some of the ways kids are taught. I'm very interested in hearing from all of you teachers." She waved her arm around the table and looked at Ruth, the high school history teacher. Ruth appeared unready to speak but said, "I'm not very familiar with it, either. Our school division had an informational workshop about it, but it was mostly vague and general and full of a lot of the same old reform rhetoric. Our biggest fear is that the subjects will get lost in all of this. The list of skills and attitudes is nice, but there are some essential elements of the disciplines that seem to get left out. And I think I can speak for most of the teachers at my school."

Mike, the corporate vice-president, agreed. "I'm worried about this too, and from what I read in the papers, especially the Richmond paper, this could turn into one of those 'touchy-feely,' open-education experiments. What we need--and I am speaking not only for my company, but I think for the country--are high school graduates who have strong basic skills, who can communicate well, and who have a good understanding of technology. So this sort of blurry image of what the Common Core represents is a little scary to me. And where does the accountability come in? I didn't hear them say anything about that this morning."

Sam, the high school principal, responded quickly. "I think that part is on the agenda for this afternoon. But I'm not sure I agree with you about the 'touchy-feely' stuff; I think a lot of that is right-wing propaganda from some of the newspaper editors. Although we still don't know much about the Common Core, my team leaders and some of my teachers are working on ways to get at the Common Core skills and keep the integrity of the disciplines intact. It's a tough job, and if the Commonwealth has the guts to follow through on this, it could make a big difference for our kids. But there's certainly no 'touchy-feely' stuff in our curriculum; the kids do enough of that on their own. And our kids don't do very well on the tests, and that is a real concern for us."

"Ours, either," Sue responded as she leaned forward across the table. "I teach first graders and if I don't give the kids a solid foundation in the basics, they'll never get through the ITBS (Iowa Test of Basic Skills.) I agree with the ideas behind the Common Core, but unless they get a lot more specific, I don't think it's going to go anywhere. I sometimes wonder when these folks at the Department of Education were in a classroom last. They seem to like to put together all of these buzzwords and jargon, and then they expect us to interpret it and make it work. And if the funding isn't there for some additional resources, this Common Core thing will die just like all the last reform projects. And in our area, the economy is really taking a lot of hits, you know, with the military cuts and all; they can't expect our school division to do much."

"You're right, Sue," Joe, the middle school teacher, replied. "Our area is in pretty bad shape, too. In our area, the mills are laying people off, and we are actually losing population--and tax revenues. But our little division is trying to keep up with the Common Core, and we've had several workshops about it; Joe Spagnola spoke at one of them, and he was pretty persuasive. Our only concern, besides the money, is how to do these things--we'll need a lot of staff development, and I know that I will need to observe some teachers making it work. Some of the Common Core areas are being covered already, but we could do a better job with the regular subjects. The way we teach them is pretty much the same way I was taught, and that bothers me."

"Well, the children certainly aren't learning the way we did," interrupted Anne. "The people we interview have a very difficult time with simple English, and my managers are always complaining about their employees' lack of responsibility. One part of the Common Core that I really like is the 'Quality Work' area. If we could just teach the kids to take some pride in their work and to follow through on a job, it would make my life a lot easier."

There was a pause in the conversation as the teachers felt the oblique criticism embedded in Anne's comment. Finally Debra, the elementary principal, spoke up, saying, "Well, I think that all relates to how inadequately we deal with the affective areas--that is, the emotional side of the kids. We are so focused on testing, testing, testing that we lose the kids who come to us with some very real problems. It's like we've forgotten why we are there. If we could spend some time and money getting them to feel better about themselves, I think we could help them feel like taking responsibility and doing quality work."

Joe looked at Beth, the student teacher, and asked, "What do you think, Beth? What are they telling you at JMU about the Common Core?"

Beth cleared her throat, put her elbows on the table, and began. "I'm in the middle grades program, so I can only tell you what I've heard there. When we first heard about it, about a year ago, it was quite different from the one that's been adopted. The earlier one was a lot more 'wordy,' but I think it had a lot more meaning--at least to me. This one is fairly loose, but it seems to fit with what we are learning in our methods classes. We're learning how to integrate the disciplines together, to teach big units instead of going from page to page in the textbook, to use a lot of manipulatives and hands-on activities; and using interdisciplinary teams, I think, really helps with the other stuff--you know, the responsibility, citizenship, and quality work. We are learning to try and make learning for kids a personal thing, relevant to them. I really don't know very much; I have only had a couple of practica, and I haven't even student taught yet."

"Well, I'm pretty pleased with the Common Core," said Terri. "If this is what it's going to take to change education, then I'm all for it. Actually, the way schools operate now is sort of barbaric for the times. My special education students need to start learning meaningful life skills and it's pretty apparent to me that handing out dittos sure isn't working." She leaned forward, continuing, "But I know that there are lots of really great things going on in schools; we just don't have the time to find out about them."

"Well, I've been teaching third grade for a long time," said Mary, "and I'm excited about this change. I hate the SOLs

(Standards of Learning) and I'm ready to start with the Common Core. It makes more sense to me, and besides, I think that most good elementary teachers try to do a lot of this anyway."

"Well, I'm real uncomfortable about the lack of specifics," responded Sue, as nods and grunted comments of agreement came from several at the table. She continued, "I thought the SOLs were a good step forward for us--we finally had some real expectations and we could measure them. But nobody paid any attention to them. Maybe the Common Core will get some attention, but it needs to be a lot more specific about expectations."

Mary leaned back in her chair and folded her arms across her chest and said, "I would hate to see the Common Core end up being a list of objectives, though. I can think of a lot of ways to incorporate or integrate most of the Common Core elements into what I do. I'd like help, though, and, like Joe, I'd like to observe some teachers making this happen."

"Does anyone else have a problem with the idea of using 'attitudes'?" asked Ruth. "They are so open to interpretation that I am concerned that different groups will interpret them differently and we'll end up with a mess. I can imagine how some people will go crazy just talking about 'work ethic' and responsibility."

"Yes, and that is one of the problem my teachers are having with this entire document," Sam responded. "They are trying not only to integrate these into their disciplines but also trying to define them. And we've found that even among the teachers there are different definitions and ideas about meaning."

"That's interesting, Sam," answered Debra. "My teachers have fewer problems building around these ideas than developing ways to teach to the SOLs. Maybe we should get together; we're not really that far apart."

Anne again took charge of the group. "Well, we have a job to do here, so let's just look at the different areas and discuss each one. I'll write down the concerns and ideas. "The first area seems to be the process skills--thinking, problem solving, communicating, collaborating, and quantifying. Any problems, concerns, or confusion about these?"

No one spoke for a few seconds, then Mike said, "These are absolutely essential. But it seems like there is one critical skill missing and that's self-appraisal. You know, looking at yourself and really knowing what's your responsibility and what you need to do it. I am always hearing 'no one told me' from our people, and I think people need to be able to look at themselves and to be able to tell what's missing and then find it. But if I had to rank order these, I'd put problem-solving and communicating as the first two. Without these, we can't function as a business."

Sam replied, "I agree--and the skills apply to a lot more than just business. But they can't be taught in isolation. I mean, it doesn't work if you try to single out the skills and just teach them. The kids need to be able to see how they all integrate into the whole and how they are relevant to the students. These skills are like the foundation when you're building a house--but you don't know what kind of foundation you need unless you know what the house is going to look like."

"Well, some of them look like our old subjects with new names: quantifying is really math, and communicating is really English," replied Mary. "But the others are critical, too; they seem to cover everything. But nobody ever taught us how to teach things like collaborating, problem solving, and thinking. We've had some workshops in these areas, but they weren't very good, so most people try to work them into their regular subjects. But overall, I have no problem with them--if someone helps us learn how to teach them."

Sue responded, "We do some of those too, but I would sure hate to see the basic subjects get lost. I like the idea of calling mathematics just that--mathematics. And 'communicating' should be called what it really is--English!"

Beth looked puzzled as she asked, "But doesn't the Common Core link all of the skills with the other elements? I think what the Common Core is trying to do is take the subjects and skills and link them together into a curriculum that has more relevance for the kids, stuff they can use and see how it's going to be useful as they study it."

"That might be nice," answered Ruth, "but without some of these skills, I can't expect my students to be able to read a history book, let alone understand what it says. I don't care how it's done in the elementary schools and middle schools, as long as the students who come to me can read and have the skills."

Anne summarized by saying, "Then I understand that there are really few problems with these skills, as long as the schools and teachers know how to teach them, and that the students keep the skills throughout their lives."

Mike interrupted, "And problem-solving and communicating come first. And there is a need to add the skill of self-examination; if a person doesn't know what he needs to know and how to get it, the skills won't be very useful."

"Okay, then, let's go on to the next area," Anne said, "citizenship, the natural world, and cultural and creative endeavors. These are the areas of essential knowledge within which our presenter said the disciplines and subjects would be embedded. I still have a little problem with these, in that they are so . . . generic. I'm more oriented toward the traditional subjects. Our kids need a sense of history; they need to know more about their roots and how that all fits into the flow of civilization. And the world is probably going to be run on math that has to do with scientific exploration, computers, the whole DNA thing, and further exploration of the universe. Kids need some hard science. I don't have a problem with the present science courses, just the manner in which they're taught and I feel the same way about math; they need lots of math, but not in the way it's taught now. So I'm still a little uncomfortable about trying to embed the subjects into these areas."

"Me, too," said Mike. "The regular courses kids take could certainly be integrated into these areas, but they are sure broad. I'd hate to think that important skills and knowledge might get lost in trying to design new courses with names such as these. I'd hate to see a course in 'life-long learning' or 'quality work.' But I guess that as long as the essential knowledge gets covered, and kids learn it, it would be okay. But a term like 'citizenship'? What do they mean by it? What are the parameters? I'd also be very interested in knowing just who will be setting those definitions and parameters. There are some pretty liberal people out there who certainly have different ideas about citizenship from mine." He looked a bit angry as he turned to Beth and asked, "What are they teaching you at JMU about teaching citizenship and values?"

Beth thought for a moment, then answered, "Well, most of that is taught within the area of social studies. We didn't get into those concepts as much as we did the actual methods we might use to teach them, mostly using history and current events. But I don't know how I could teach something like citizenship without using some history. And I don't know how I could teach something like 'cultural and creative endeavors' without art, music, literature, or poetry. So I don't really see too much of a problem getting the disciplines into the areas. We do a lot of integrating subjects and using interdisciplinary approaches both in class and in our assignments."

Joe responded, "That's tough to do, though, in the 'real' world. For us, the curriculum is pretty well set and we have to follow it. We've had some parents and board members who got upset when some of our teachers tried some interdisciplinary units. I thought they were great, but we took some flak about them. A lot of our teachers try to follow the SOLs and this might really be a problem for them."

"We try to follow them, too," said Sue. "It's kind of a coordinated effort. If I miss some of the SOLs in the first grade, then the second and third grade teachers are put in a bad position. This new Common Core is going to cause our teachers a lot of confusion. And our division isn't real supportive with inservice, either; when we do have some, it usually isn't worth the time and effort to attend."

"But doesn't it just make good sense to make the curriculum meaningful?" responded Debra. "By integrating the subjects and making them understandable, they become the avenue for addressing students' affective needs as well."

"Wait a minute," interrupted Mike. "You keep talking about 'affective needs' and I'm not sure what you're talking about. Do you mean 'emotional needs'?"

"That's pretty close. Students need to have a feeling of mission about what they're doing in school. They don't need to be told that they will need this or that in the future, but what we do in school should have relevance now and not at some time in the future. Most kids, especially in the elementary grades, have a difficult time thinking about next week, let alone ten years in the future. The emotional component of learning is a big part of that feeling of mission."

"Good. You aren't talking about values clarification or sex education. I guess I understand," replied Mike.

"Okay, let me give you what I've got about the essential knowledge areas," Anne chimed in. "First, there are concerns that the traditional subjects will either be omitted or diluted to the point where key elements of the disciplines will not be learned. Second, it seems to me that the teachers in the group are saying two things: that these concepts are extremely broad, vague, and subject to interpretation and that it is possible, but very difficult, to integrate them into the subjects. The third thing I have is that the present standards are being used in some places and not in others, but replacing them with these broad concepts will make life more difficult. And last, there is some confusion over the affective or emotional needs of kids and how the Common Core fits with them. Did I miss anything?"

Hearing no responses to her question, Anne said, "Well then, I think we should move to the attitudes portion of the

Common Core. And this is an area where I am in complete support of the Common Core. Admittedly, it's self-serving, since I want to hire people who aren't afraid of responsibility, who know how to learn, and who do quality work. But I can't think of any area of life where they aren't needed."

"Yeah, but these are the areas that my teachers have the most problems with," Sam said. "Most kids come to school without any of them--they don't want any responsibilities, they don't care about or know how to learn, and they sure don't much care about the quality of their work. And my teams are working on how to instill these attitudes through the curriculum. They keep coming up with the old time conflict. They don't have time to teach the subjects the way they are, and adding other components to teach responsibility or learning methods means that some parts of their courses will have to go. So I'm pretty skeptical about whether students will actually learn more. Again, if they can be effectively taught within the boundaries of the disciplines without destroying the discipline, then fine. But my teachers don't see how it can be done."

"Yeah, I'd still like to know how all of these attitudes would be actually taught in the classroom," added Joe. "I realize that my subject areas, math and science, are strongly connected to these attitudes, but I have no idea how to incorporate them into what I do in the classroom. Yeah, I'd like to have all of my students be more responsible, take charge of their own learning, and do quality work. But I've tried everything I know and everything I've heard about, but I haven't had much luck. And besides, they come to us with a lot of attitudes that are in direct opposition to these--they get them from home, the streets, and television. Have you ever noticed how the value of school is ridiculed or underplayed on all of the shows the kids watch? It's disgusting. How can we fight that?"

"So you're saying that these attitudes are ones that kids must get at home and then bring to school with them?" Mike asked.

"Well, not completely," Joe answered, "but if they don't have a good foundation in them when they come to school, there really isn't much we can do. We're outgunned."

"You know, before everyone went crazy over testing, we used to spend a lot more time dealing with just these sorts of attitudes. I think it's wonderful that we're finally seeing some value in them," Mary added. "But you are right about the need for better and stronger communication between the home and the school. Without that, I don't think any of this is going to do any good."

Sue said, "I agree with you about the need for parent communication, but I don't agree with you about the attitudes. The more we try to add to our curriculum, the farther away we get from the basic subjects. I realize that these attitudes are very important, but they need to be incorporated into the basic subjects without watering them down. We aren't doing the kids any favors by trying to teach them things we don't know how to teach. Besides, a lot of the teachers I know don't have these attitudes; they avoid responsibility, couldn't care less about their own learning, and sure don't do a quality job in the classroom. But not every teacher, just a few."

"You're right, of course," responded Debra with a sigh, "but I think these

Common Core attitudes might help the teachers, too."

"That may be the most difficult problem of all," said Sam, "which is why we are using a team approach."

"Speaking of difficulties, let's talk about the reality of this actually happening," responded Anne. "People are pretty resistant to change, and I think that will prove to be the most difficult aspect--even more difficult than the funding issue, and I'm sure funding will be pretty difficult."

"Our middle schools have been working on this type of approach for a couple of years, and the elementary schools, too," replied Terri, "but the teachers in the high school don't want any part of it. One of my best friends teaches 9th and 10th grade math, and he said that there was almost open revolt against the principal when she brought in some folks for an inservice about this type of thing. I think the high schools will be the toughest part to change."

"I think the problem of making the Common Core work in high schools really depends on how the school division leaders approach it," responded Sam. "If you try to force people to change before they're ready, you're shooting yourself in the foot. Our principals and lead teachers have been through some fairly intense meetings, and I think we're starting out in the right direction."

"We've done much of the same thing," Mary said, "and we've already begun to use a similar framework. As I mentioned, the Common Core is more attractive than the old SOLs--a lot more child-centered, too. I don't know what is happening in the high schools, but in our K-3 school and in the middle schools, there is a lot going on, especially with evaluation alternatives, parental involvement, outcomes, expectations, and the progression of the content. As a matter of fact, I think we've gone a bit beyond what the State Department has put together."

"Ours, too," replied Joe, "but we are being cautious."

"I think we're way ahead of the state, too," interrupted Terri.

"Well, in our little rural division, there really hasn't been much of a thrust toward the Common Core," replied Debra; "it's more like an awareness. I think they are waiting it out to see how things develop. This is the first real information I've gotten, and I'm a principal!"

"As I listen to you talk, it occurs to me that the urban areas and the suburban areas seem to be ahead of the rural or outlying areas," Anne said. "Why is that? It seems backward--I mean, shouldn't the smaller school divisions have more flexibility and be able to respond more quickly?"

"Not necessarily, Anne," answered Joe. "It's a matter of resources and money. The budgets are so tight in the small divisions that they are afraid of making a mistake and wasting money. So they wait until the dust settles before they start."

"Is funding the greatest obstacle for the Common Core?" asked Mike. "It's hard for me to understand that, given the amount of money spent on schools now."

"I think the greatest challenge will be getting older teachers to change," responded Sam. "That's why we are taking it slowly and using teams."

"It's not just the older teachers," challenged Mary; "the young teachers aren't easy to change, either. They teach the same way they were taught, and the Common Core forces everyone to think about how they teach and how kids learn and that doesn't mean using the same plans year after year. I'm not looking at this as a mandate, but as an opportunity to do a better job."

"Well, I think you are probably an exception," replied Anne. "People don't like to change, and I think that will be more difficult to overcome than money. And the idea of change extends to parents, too--they're going to be worried about all of this. The kids will probably love it; they love to experiment. In addition, you'll have to sell it--and it will take a fantastic advertising campaign, because you will have to reach not only your customers but other people in the communities, too. Know your customers, sell them on the idea, and then put the kids in it. If you don't, you'll have parents screaming and it will bog down."

"That's true," Mike added, "but I don't see any obstacles coming from the business area unless we get hit with a huge tax increase to pay for it. But if it works, it would mean our businesses will get better people."

"Well, I think this whole effort will be just another one of the State Department's flops," replied Sue. "We've been through all of this before, and no matter what kind of selling you try to do, there won't be a Common Core if it doesn't get a real big dose of specifics: basic skills, curriculums, and some specific things to do in the classroom."

"That's right," Mike said. "They better not do this without some very good planning. If they go about it with the old 'ready, fire, aim' method, this thing won't go anywhere. But if they plan carefully, implement slowly, check constantly, and then revise and continue, the Common Core just may work. But then, government agencies aren't known for doing things well, are they?"

"Well, it's going to have to be a comprehensive, committed, and high quality effort," added Terri.

"And your greatest asset, your own jurisdiction, could also be your greatest obstacle," added Sam. "Your constituents are either going to block your efforts or support them. Principals and teachers alike are going to have to know where to put the energy and where to fight the battles, especially during a time when money is so tight--people take fewer risks in time of financial crisis, and the Common Core is a big risk. So your constituents could either make you or break you."

"You're probably right," responded Joe. "Even where we are, there will be problems. I can probably name the parents who will be the strongest opponents, as well as those who will support it. It's going to be a tough balancing act. And teachers hate to be put in the middle of that sort of thing, because it takes them away from why they do what they do--the kids."

"You guys are scaring me," said Beth, "I don't know if I'm ready for all of this political stuff. I sure haven't had a course in this!"

"Well, maybe the universities should teach such a course," replied Ruth; "it's reality. Hasn't always been that way, though. When I started teaching, you had a room, the books, your class register, and once a month you got a paycheck. Sometimes I wish we could go back to that!"

Debra said, "But that's what this is all about, isn't it? For years we taught the same way, but the kids, the culture, and the world have changed. The kids need more than what we once gave them--hell, I need more. Things change so fast that you can't keep up or survive unless you have the things the Common Core is suggesting. I think that's why we have such a difficult time with discipline these days. Kids know that the stuff we try to pump into them is worthless and boring. They see what's going on in the world and if we don't help them, they're going to rely on MTV and 90210 to try and make sense of the world."

"Maybe, maybe not," interrupted Ruth. "Kids today just don't have the ambition, the motivation, or the skills--and they don't seem to want them, either. I think we've made it too easy on them, and I'm not sure the Common Core or any of the reform programs can help that."

"Sounds like you don't want to change much," responded Mary.

Ruth's voice rose as she defended herself, "Well, if they would provide me with the tools and the training--not brainwashing--I could do it. But I was trained in a fairly traditional manner and I would need a lot of help! And when has the state provided us with some really effective training or inservice? Not often!"

"We'll all need a lot of help and training," replied Mary. "Change is difficult for anyone, but especially for teachers. And time is an important factor, too; it seems like we are constantly given more and more to do with less and less time."

"And we aren't really allowed to experiment or work on improving new ideas. We're expected to make programs work immediately," interjected Terri. "I get hit by new programs and materials all of the time but I never have time to really make them work for me. If the Common Core is going to be like that, people will go right back to the old ways of doing things--and I don't blame them!"

After a pause, Mike said, "It's interesting to hear you talk about your inservice and training. Most larger corporations take training for granted--and spend billions. This hotel would probably go broke without companies using it for training and development throughout the year. And what I'm hearing you say is that you don't get much of that--and that it will be critical to make the Common Core work."

"You got it!" Joe said, almost shouting his response.

Just as Joe made his response, an amplified thudding sound could be heard, as the State Department leader tapped her finger on the microphone on the stage. "Could I have everyone's attention, please?"

TEACHING NOTES

Case Context and Overview

The conversational case, "Third Period We Have Life-Long Learning," is based on a composite of responses and comments taken from actual interviews with elementary, middle, secondary, and special education teachers, principals, business leaders, and student teachers. The interview questions focused on the Commonwealth of Virginia's current educational reform effort--the Common Core of Learning (Appendix A). The interviews took place during a period of early political and educational discussion regarding this effort, that is, at a point very early in the adoption stage.

Teaching the Case

The effective instructor or leader using this case should become familiar with current research on educational change. Some excellent pre-readings might include Fullan and Stiegelbauer's The New Meaning of Educational Change (1991), Liebermann, Darling-Hammond, and Zuckerman's Early Lessons in Restructuring Schools (1991), and Sarason's The Predictable Failure of Educational Reform (1990). Additional research and rhetoric may be found in 1990-1993 issues of Kappan and Educational Leadership and other current educational periodicals. Hall, George, and Rutherford's (1979) research with concerns and attitudes toward innovation and change would also provide worthwhile additional information.

Given its conversational nature and the fact that there are 10 people's comments to track, the leader or instructor might opt to assign roles to individuals rather than using the traditional method of assigning the reading of the case before meeting for discussion. Of course, all participants would be expected to read the case thoroughly.

Case Elements

Change and reform are difficult concepts in any context; however, educational change and reform are particularly complex and prone to failure. Indeed, although American education appears to be in a constant state of reform and change, little actually seems to change (Cuban, 1988). Fullan and Miles (1992) suggest that typical approaches to educational reform are plagued by seven different yet related reasons for failure: faulty maps of change; complexity of problems; symbolic action over substantive change; impatient and superficial solutions; misunderstanding of resistance; attrition of pockets of success; and misuses of knowledge about the change process (p. 745.)

Most of these failure-related elements are represented in the case conversation. For example, Mike, the vice-president of a large pharmaceutical firm, saw the management of change as a fairly rigid and sequential process requiring careful planning and evaluation. His map is certainly one that has been used successfully in the past in both education and business; but conscientious analysis of current research suggests this paradigm of change and improvement is shifting from his idea of management to less centralized, more collaboratively controlled forms.

It is also obvious that the teachers are fairly supportive of the Common Core of Learning, but possibly because of earlier experiences with reform efforts, are mistrustful and cautious about it; they seem to have experienced symbolic approaches and superficial solutions and a variety of different approaches to the Virginia Standards of Learning. They appear also to be significantly more aware of the complexities involved and place a great deal of emphasis on the potential resistance to the Common Core that might spring from a number of areas.

Attitudes are central to the study of this case. In any organization, members arrive and work in the organization with a multitude of attitudes and concerns. Attitudes, complex personal responses, or dispositions toward an object or set of objects are key elements in the adoption or rejection of change (Oskamp, 1991). Indeed, consideration of these attitudes toward any change or innovation is often the factor that determines the success or failure of innovation (Canary and Seibolt, 1984; Carr, 1985; Shaw and Wright, 1967). The attitudes felt in the case conversation were dissimilar in many ways, but common threads can be found within the conversations. Case readers should examine the participants' conversation with respect to individual attitudes and the apparent stage of concern within which each member's attitudes reside. Hall, George, and Rutherford (1979) suggest that all members of an organization pass through stages as they adopt an innovation: awareness, informational, management, consequence, collaboration, and refocusing. Every individual begins with simple awareness of the innovation or change, progresses through the stages sequentially, and concludes with making improvements on the innovation. For example, Mary appears to be concerned with the consequences of the changes on her students (consequences stage) and Debra, although very supportive of the affective elements of the Common Core, is still seeking more information about it (informational stage.)

Other attitudes also appear important but somewhat uninformed. For example, Mike's attitude toward "affective development" was positive only in light of the definition Debra gave him. He obviously had some strong attitudes about such things as sex and values education. Sue's attitude toward teaching basic skills would also be interesting to examine and discuss; her attitude toward Common Core elements that seem to diverge from basic skills was less than positive. This attitude was significantly represented in the case interviews used to portray the conversation.

The following discussion questions are structured in a similar manner as the original interview questions, but ask the readers to examine and make comparisons about the Common Core elements as well as make comparisons regarding their own attitudes and feelings about it. In teaching the case, care must be taken to allow readers to examine the etiology of their personal responses as well as to make conjectures about the reasons for the case conversants' attitudes and feelings. The hope is that the personal reflection of attitudes or feelings, in combination with the open discussion of these attitudes, will widen the perspectives of the readers in order to assist in beginning the synergistic process of planning, accepting, and implementing improvement.

DISCUSSION AREAS AND QUESTIONS

Knowledge

1. Overall, how much knowledge did the participants have about the Common Core of Learning?
2. How did the participants find out about the Common Core?

Common Core Process Skills: Thinking, Problem Solving, Communicating, Collaborating, and Quantifying.

3. How were the responses to the process skills similar or dissimilar? Did any of the process skills emerge as more or less important? If so, in what way?
4. Based on the case conversation, what areas of conflict do you predict for the Common Core Process Skills?

Common Core Essential Knowledge: Citizenship, the Natural World, Cultural and Creative Endeavors

5. How were the responses to the essential knowledge areas similar or dissimilar? Did any of the knowledge areas emerge as more or less important? If so, in what way?
6. Based on the case conversation, what areas of conflict do you predict for the Common Core Essential Knowledge areas?

Common Core Critical Attitudes: Responsibility, Learning, and Quality Work

7. How were the responses to the critical attitudes areas similar or dissimilar? Did any of the knowledge areas emerge as more or less important? If so, in what way?
8. Based on the case conversation, what areas of conflict do you predict for the Common Core Critical Attitudes area?

Implementation Efforts

9. How did the respondents seem to feel about how the Common Core of Learning was being introduced around the state?
10. What attitudes concerning Virginia's State Department of Education were evident? Which of the participants seemed to have the strongest feelings?
11. What differences were evident with respect to local school division introduction and implementation of the Common Core? To what do you attribute these differences?

Obstacles and Barriers

12. What major obstacles did the participants foresee for the Common Core of Learning?
13. What differences in attitudes were evident toward the obstacles or barriers? To what do you attribute these differences in attitudes?

Personal Comparisons

14. With whom do you find yourself in agreement? What attitudes or responses did this person exhibit that are most like your own?
15. What experiences have you had that might have influenced your attitudes?

16. Are you satisfied with your personal set of attitudes regarding the Common Core? If not, what attitudes would you most like to have regarding the Common Core of Learning? Why?

Planning for Change

The remaining question and discussion area asks the case readers to examine possibilities for developing supportive plans specific to their respective communities.

17. Planning simulation: Given your knowledge of your school and the community within which it resides, draw a large matrix in the following elements. Along the horizontal axis and along the top of the page, list the five Process Skills, the three Essential Knowledge areas, and the three Attitudes used by the Common Core of Learning. Along the vertical axis, list the various players who will have a stake in the success or failure of the Common Core. For example, the vertical axis might list administrators, parents, teachers, community leaders, business leaders, religious leaders, etc. Usually, there will be at least two categories within each of these areas: one that represents supportive elements and one that indicates unsupportive elements. For example, some religious leaders in your community may feel strongly that the area of Citizenship is one that is best left out of public schools completely, because of the possibility of a focus on secular instruction rather than on Christian monotheistic instruction. Other religious leaders may feel very differently about this area, and some research into the community becomes necessary.

Once the matrix is as complete as possible in the context of the group, use each intersection to discuss planning areas that will potentially address needs and problems foreseen within each community constituency.

APPENDIX A

THE VIRGINIA COMMON CORE
OF
LEARNING
FRAMEWORK

Adopted by the Board of Education

May 27, 1993

Virginia Department of Education
P. O. Box 2120
Richmond, Virginia 23216-2120

". . . free government rests, as does all progress, upon the broadest possible diffusion of knowledge, . . . the Commonwealth should avail itself of those talents which nature has sown so liberally among its people by assuring the opportunity for their fullest development by an effective system of education throughout the Commonwealth."

The Constitution of Virginia
Article I, Section 15

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PREFACE

> ...Either we commit now to high performance in the processes and products of our schools and industries, along with the development of motivated and highly skilled people, or we consign more than 70 percent of our workers to increasingly lower wages and put our heritage truly at risk as the global economy washes over us...
>
> **The National Center on Education and the Economy**

America led the world in developing a system of universal schooling. Great statesmen like Thomas Jefferson had the vision to connect the viability of an emerging democracy with the education of its people when he said, "If a nation expects to be ignorant and free, it expects what never was and never will be." The leadership of our forefathers enabled this country to enjoy unprecedented liberty and freedom as well as the highest standard of living in the world.

If America is to continue as a world economic leader in the 21st century and our workers are to compete successfully for high-wage jobs in the increasingly global economy, our young people must have knowledge and skills equal to the best in the world.

The most pressing issue facing education in America today and tomorrow is relevancy -- the relevancy of schooling to the needs of children who will be the adults of the future. What knowledge, skills, and attitudes must they possess for their economic well-being and their ability to participate as citizens in a democratic society and in a world that is changing rapidly?

The central theme in numerous state and national reports is very clear: If we are to meet such challenges and opportunities, our system of education must be revamped to meet emerging national and international circumstances. The key to future success will be an integrated approach to learning based on real-life issues. Strong emphasis must be placed on quality education for all children.

Virginia is not alone in its need to reform public education. The weight of authoritative opinion is that schools must concentrate not only on what students are able to demonstrate, but also on what knowledge and skills they will need to perform successfully as adults. Virginia's response to the critical issues in our economy and in our society is embodied in the World Class Education initiative, the centerpiece of which is the Common Core of Learning.

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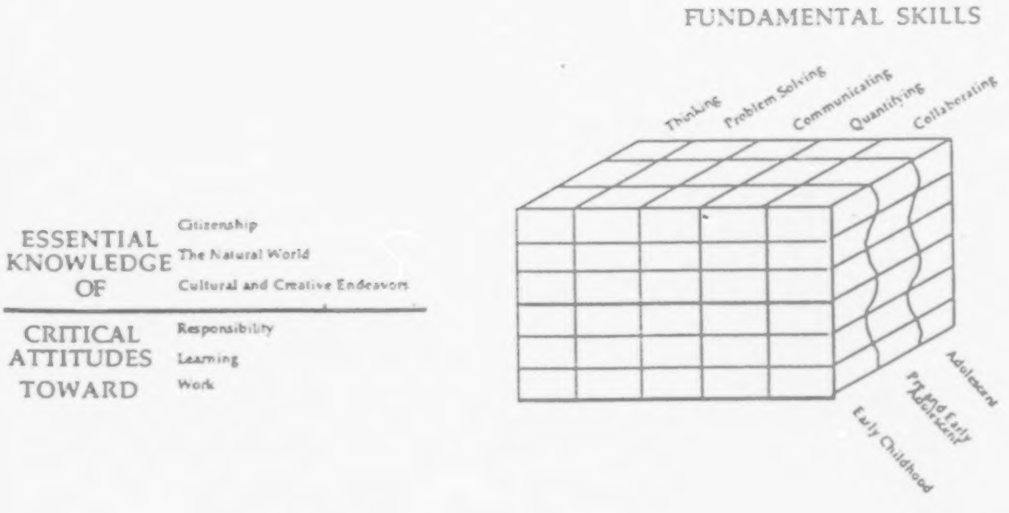
The Common Core of Learning

The Common Core of Learning describes the core of essential skills, knowledge, and attitudes that students must acquire and practice in order to succeed in school and in life. It establishes a foundation for schools that addresses the needs of children as they prepare for life in the 21st Century. It also provides a basis upon which localities can design curriculum to further enhance the knowledge, skills, and attitudes contained within the Common Core of Learning outcomes.

Each element of the core -- skills, knowledge, attitudes -- is dependent upon each other element: Skills become useful as they are applied to knowledge. Knowledge becomes real as students use skills to apply it. Productive attitudes drive the desire to learn and the perseverance to learn well.

The Common Core of Learning is an interdependent, dynamic structure. A curriculum designed to accommodate the common core can become an active curriculum: not merely a list of objectives or information, but a series of complex, significant tasks that organize instruction and demand both fundamental skills and essential knowledge for their successful completion.

Relationships of Knowledge, Skills, and Attitudes
by Levels of Schooling



Virginia High School Graduates:
A Profile

Individuals face complex challenges, dilemmas, and problems. People are required to plan, organize, and produce ideas and products that respond to such challenges. They are called on to perform as leaders and participants, as well as to be teachers and mentors. They must be able to listen and communicate ideas effectively, identify and solve problems, and create and produce products and services. They are required to learn and to implement new ideas at home and at work. And, they must be able to resolve conflicts and problems, and think clearly and creatively.

Individuals who leave school with a world class education will do so after having participated in rigorous learning activities leading to the acquisition of knowledge and critical attitudes toward learning and work that they need to lead productive lives. They will possess fundamental skills that will enable them to think, solve problems, communicate, quantify, and collaborate in order to master the knowledge necessary to achieve the following goals:

- Accept the responsibilities of citizenship through an understanding of the economic, historical, and geopolitical factors that shape our community, state, nation, and world;
- Understand the natural world, the relationship of the environment to our well-being, and the need to manage limited resources responsibly;
- Appreciate and evaluate cultural and creative activities and understand the role of culture and the arts in enriching both the individual and society;
- Respect themselves and others, and understand the value of being trustworthy and dependable in maintaining relationships;
- Sustain a commitment to continuous learning through the acquisition of knowledge and skills after formal schooling has been completed; and,
- Strive for quality, take pride in their work, and become effective and productive participants in their chosen fields of endeavor.

FUNDAMENTAL SKILLS

The fundamental skills are those things that students must be able to do to achieve the outcomes described in the Essential Knowledge and Critical Attitudes sections of the Common Core of Learning. These fundamental skills interact with knowledge and attitudes to form the basis for learning .

Fundamental Skills

Thinking

Thinking requires the evaluation and integration of information and the use of a variety of processes when making decisions and solving complex problems. The following aspects of critical and creative thinking are necessary to achieve the Common Core of Learning Outcomes:

- Acquiring relevant and reliable knowledge through discovery, investigation, and a demand for verification;
- Developing productive habits of mind that make learning more effective, including openness to new ideas and persistence when a solution is not readily apparent;
- Using creativity to combine ideas and information in new ways by making connections between academic disciplines as well as seemingly unrelated data and ideas; and,
- Evaluating traditional and novel methods of achieving goals, and selecting the best alternatives based on an analysis of the risks and rewards of each.

Fundamental Skills

Problem Solving

Problem solving requires developing, analyzing, choosing, applying and evaluating solutions to discipline-specific, interdisciplinary, or thematic problems or issues identified by students within the context of the Common Core of Learning outcomes. The following are critical aspects of problem solving:

- Recognizing that a problem exists by identifying inconsistency in data, discrepancy between projected outcomes, or the obstacles to achieving the desired goal;
- Formulating questions which help to understand the problem by clarifying issues and identifying underlying assumptions, premises, and frames of reference;
- Planning a solution by identifying sources of relevant information, appropriate problem solving strategies, and efficient techniques and technologies to collect, organize and evaluate data;
- Carrying out the plan, making objective and accurate observations, analyzing information and reaching conclusions by making generalizations, inferences, and predictions based on available facts; and,
- Determining if a solution is complete and effective.

Fundamental Skills

Communicating

Communicating requires comprehending and using words, pictures, styles, and symbols for creating, conveying, and processing thoughts cultivated within the context of the Outcomes. The following are the critical aspects of communicating:

- Locating, comprehending, and interpreting written information in prose and in documents such as manuals, tables, graphs, and schedules;
- Communicating thoughts, ideas, and information through oral, written, and graphic presentations such as letters, journals, computer programs, speeches, instructions, and reports;
- Selecting, organizing, and analyzing information and communicating the results to others through oral, written, symbolic, graphic, pictorial, and multimedia presentations;
- Receiving, interpreting, and responding to verbal and nonverbal messages;
- Responding to ideas and emotions expressed through the visual, performing, and literary arts; and,
- Recognizing and appreciating the unique benefits associated with proficiency in another language.

Fundamental Skills

Quantifying

Quantifying requires the ability to connect and apply mathematical concepts, procedures, and models within the context of the Common Core of Learning Outcomes. The following critical aspects of quantifying can be developed through the use of technology, and expressed by using the language of mathematics:

- Applying number sense, number relationships, the structure of number systems, and a variety of computational procedures in a broad range of problem solving situations;
- Analyzing patterns, functions, mathematical relationships, and other algebraic concepts by using arithmetic, algebraic, geometric, and graphic approaches;
- Applying concepts of shape, multi-dimensional space, and the techniques of measurement to describe and solve problems related to the physical world;
- Analyzing data by using statistical concepts and processes; and,
- Applying the concepts of randomness and chance to make predictions and decisions based on probabilities.

Fundamental Skills

Collaborating

Collaborating requires the demonstration of effective leadership and group skills needed to pursue individual and group goals. The following critical aspects of collaborating are necessary to achieve the Common Core of Learning Outcomes:

- Contributing ideas and suggestions as team leaders or members to accomplish group objectives;
- Evaluating and managing one's own behavior within the functioning of the group;
- Functioning as a leader in groups to help others learn;
- Demonstrating interactive and effective communication with others; and,
- Listening carefully to the opinions of others.

Essential Knowledge

Essential knowledge, derived from the disciplines, is at the foundation of learning. These disciplines include mathematics, science, history, geography, foreign languages, arts, literature and others. The goal is to teach the disciplines in a challenging, rigorous, and relevant way, benchmarked to world class standards. The outcomes listed in this section describe many of the understandings and abilities that each person will require throughout life.

Essential Knowledge

Citizenship

Persons capable of accepting the responsibilities of citizenship through an understanding of the economic, historical, and geopolitical factors that shape our community, state, nation, and world.

STANDARDS-BASED OUTCOMES

Be able to:

- Understand and accept the responsibilities of American citizenship.
- Analyze the meaning and effects of significant American and world ideas, events, and historical documents.
- Investigate the history, culture, and geography of people as they are reflected in a variety of social, ethnic, and linguistic groups.
- Investigate and understand how goods and services are produced, distributed, and sold.
- Identify community problems and negotiate solutions contributing to the public good.
- Investigate relationships among social, political, and economic issues.

Essential Knowledge

The Natural World

Persons capable of understanding the natural world, the relationships of the environment to their well-being, and the need to manage limited resources responsibly.

STANDARDS-BASED OUTCOMES

Be able to:

- Investigate the structure and dynamics of physical and living systems through an understanding of physical and life sciences.
- Identify the uses and potential uses of the natural world and the benefits and problems associated with each.
- Develop skills to utilize and monitor environmental resources.
- Appreciate the aesthetics and diversity of the natural world and their relationship to our physical, social, and economic well-being.
- Examine how environmental decisions are made by individuals, businesses, and governments.
- Use the environment responsibly.

Essential Knowledge

Cultural and Creative Endeavors

Persons capable of appreciating and evaluating cultural and creative activities and understanding the role of culture and the arts in enriching both the individual and society.

STANDARDS-BASED OUTCOMES

Be able to:

- Explore, investigate, and experience various cultural and creative endeavors.
- Express insights, feelings, and perceptions through a variety of creative processes, performances, or products.
- Examine culture, the arts, and technology.
- Examine ways culture and the arts reflect history, beliefs, and traditions.

Critical Attitudes

Certain attitudes motivate students to apply their skills to knowledge, and encourage them to persevere and do their utmost to learn. Most values toward life are properly taught by the family. Certain attitudes toward learning, toward work, and toward others are essential to success in school and in life, and should be reinforced in the school setting.

Critical Attitudes

Responsibility

Persons who respect themselves and others, and understand the value of being trustworthy and dependable.

STANDARDS-BASED OUTCOMES

Be able to:

- Exhibit truthfulness, fairness, integrity, and respect for self and others.
- Contribute to their own health, safety, and physical fitness.
- Understand the views and needs of others.
- Analyze conflicts to discover methods of cooperative resolution.
- Communicate and cooperate with people of varied backgrounds.
- Understand the diversity of our society and respect the civil and human rights of others.

Critical Attitudes

Learning

Persons capable of sustaining a commitment to continual learning through the acquisition of knowledge and skills.

STANDARDS-BASED OUTCOMES

Be able to:

- Demonstrate effort and commitment to learn.
- Develop, implement, and manage personal, educational, and career plans.
- Prepare for change and evaluate its implications for learning.
- Use efficient learning techniques and technologies to acquire and apply knowledge and skills.
- Use a variety of information resources for learning.

Critical Attitudes

Work

Persons who strive for quality and take pride in their work, and who are capable of becoming effective and productive participants in their chosen fields of endeavor.

STANDARDS-BASED OUTCOMES

Be able to:

- Value high quality performance and persevere until it is achieved.
- Take responsibility for their own work.
- Work effectively with others.
- Plan, produce, and deliver high quality products and services.
- Use emerging technologies and resources effectively.
- Recognize the need to change work methods and adapt to changes as needed

The success of the World Class Education initiative depends on the willingness of all Virginians to think about public education in new ways. Changing to a new, dynamic system will be difficult. It will require active support from school administrators, teachers, school board members, parents, students, representatives of business and industry, political leaders, and, indeed, all citizens.

Glossary

Critical Attitudes	Certain attitudes motivate students to apply their skills to knowledge, and encourage them to persevere and do their utmost to learn. Most values toward life are properly taught by the family. But, certain attitudes toward work, toward learning, and toward others are essential to succeed in school and in life.
Demonstrations	The products and performances indicating student proficiency and the student's achievement of the Common Core of Learning outcomes.
Disciplines	A traditional body of knowledge, skills, processes, values, and attitudes specific to a particular area of study.
Essential Knowledge	Essential knowledge, derived from the disciplines, is the foundation to learning. The outcomes listed in this section provide a description of the understandings and abilities that each person will require throughout life. High expectations for acquisition of knowledge is critical to students leading productive lives in a globally competitive society.
Fundamental Skills	Fundamental skills of thinking, problem solving, communicating, quantifying, and collaborating define what students must be able to do and form the basis for learning knowledge and skills identified in the standards-based outcomes.
Outcome-Based Education	Focusing curriculum, instruction, and assessments on student success in achieving the knowledge, skills and attitudes defined through the standards-based outcomes.
Performance	An activity demonstrating achievement.
Product	A tangible, observable object or thing that demonstrates achievement.

Standards	Defines the interaction of the fundamental skills with essential knowledge and critical attitudes for students at approximately ages 8, 12, and 16.
Standards-Based Outcomes	The Virginia Common Core of Learning Outcomes and accompanying standards at the early childhood, pre and early adolescent, and adolescent levels.
Task	A complex activity that requires one to bring together a repertoire of knowledge, skills, judgments, and actions to demonstrate achievement.
Thematic	Using themes (i.e., change, balance, scarcity) to establish broad, overlapping boundaries between disciplines.

Bibliography

These materials, and others like them, provide some details about today's urgent need for educational reform. They illuminate the idea that the Common Core of Learning for all students can be a step in the right direction. The Common Core of Learning, supported by appropriate restructuring to make possible its implementation, improvements in teacher training, more useful assessment, and other measures, could make educational reform a reality rather than just a goal.

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Case Study 2: Moving Toward A Developmental Literacy Assessment

by Dr. Phyllis Y. Coulter,
Eastern Mennonite College

Background: Conditions for Change

In the latter part of the 1980s, national, state, and local level early childhood education organizations began to criticize the use of standardized reading readiness tests in kindergarten. In 1986, the Early Childhood and Literacy Development Committee of the International Reading Association stated in "Literacy Development and Pre-First Grade," that "the pressure to achieve high scores on standardized tests that frequently are not appropriate for the kindergarten child has resulted in changes in the content of programs" and recommended "[Using] evaluative procedures that are developmentally and culturally appropriate for the children being assessed, and alert parents to the limitations of formal assessments and standardized tests of pre-first graders' reading and writing skills." In 1987, the National Association for the Education of Young Children (NAEYC) issued a position statement on standardized testing of young children 3-8 years of age cautioning educators that "decisions that have a major impact on children . . . should be based on multiple scores of information and should never be based on a single test score." In 1989, the Virginia Department of Education formed a readiness assessment committee to address the widespread use of standardized readiness tests. In that same year the Department produced a Developmental Kindergarten Document and introduced it at the state-sponsored kindergarten conference.

The assessment section of that document states: "Assessment practices should reflect and be consistent with the developmental nature of the kindergarten curriculum; because the items comprising these tests (reference to norm-referenced, standardized group tests) represent a limited sampling of knowledge and achievement in specific areas, the results must not be used alone to evaluate individual performance or place children in homogenous groups." This information raised the following questions for the teachers and administrators in this small city school division. Is the use of the Metropolitan Readiness Test (MRT) developmentally appropriate? Do we have to keep using the MRT? If we don't use the MRT, how can we identify the Chapter 1 population? What can we use that is consistent with a developmental philosophy but is still valid and accurate in identifying children who can benefit from Chapter 1? Classroom teachers were interested in change. Therefore, the situation called for an administrative response.

Key Players: Facilitating Change

Linda, a former Chapter 1 coordinator in another local school division and now Language Arts/Chapter 1 Supervisor, responded to these questions with a series of initiatives. Linda's own expertise and years of experience in the field of reading supported her efforts. She has an M.A. in reading, an endorsement in supervision, and is active professionally in local, regional, and state projects and organizations. Additionally, Linda undertook a series of initiatives, in her first years with the division, which established her as a trusted, capable professional who respected teachers' opinions which enabled her to work collaboratively with teachers to make decisions that affect their classrooms. Specifically, from 1987-1989, Linda changed the Chapter 1 program and the reading/language arts program from a basal reader dominated skill-based approach to an integrated language arts approach, using books and writing for real purposes. Working with a local university professor, she provided a series of workshops exploring the latest research in reading and language arts leading to discussion of the implications for change in instruction.

Linda and Sue, the college professor, had previously worked together for eight years as Chapter 1 reading teachers in the largest elementary school in the county school district. Together, they created programs to bring about change in that school district. In the intervening four years, Linda took an administrative position in another school division before joining this small city school's central office staff. Sue pursued her doctorate and became the elementary school supervisor in an adjacent school division.

In the spring of 1989, Linda worked with the local university to hire Sue to teach a course to develop the K-5 language arts curriculum guide. Two teachers from each grade level, including a Chapter 1 teacher and two building level administrators, were selected for the course. In this course Sue laid the groundwork for using alternative assessments to document literacy development. Writing this curriculum guide laid the foundation for change. Once completed, the class participants requested a multi-faceted staff development effort to support teachers as they tried to implement the guide. Thus, Linda could legitimately begin using more individually administered performance assessment tasks and move away from the MRT.

In 1988, following her dissertation, Sue worked with her Director of Instruction to replace the MRT with a pre-literacy assessment that the teacher administered to each kindergarten child. During this time, Sue left the school division to work full time at a local university but maintained involvement with the work. For the next two years data from this assessment, administered to over 700 kindergarten students, were analyzed. Three tasks seemed to emerge as valid and accurate in identifying at-risk readers. These tasks--sense of word task, story retelling, spelling task--formed the pre-literacy assessment introduced to the small city division kindergarten teachers in the spring of 1992.

Stakeholders: A Real Reason to Change

The thirteen kindergarten teachers in this small city school division included beginning teachers as well as seasoned veterans. Two had early childhood Masters degrees and also served on the Language Arts Curriculum Guide Committee. Seven completed a graduate level course in literacy development. Collectively, they characterized their undergraduate training as firmly rooted in a "developmental" philosophy.

Their training prepared them to keep anecdotal records of social behaviors as a major focus of assessment. They believed that standardized readiness tests were not developmentally appropriate even though they were required to administer them. One teacher commented that when administering the MRT, she found that "More than one child had tummy aches and tears from the frustration and stress of the testing. I was frustrated, too!" Others reported watching as the children tried to "look on each other's papers" for answers to tasks that were foreign to the curriculum. Still another teacher reported higher than usual absences on test days due to "illness."

At the onset of this process, Sue asked, "What is the role of testing in kindergarten?" One experienced teacher, Sharon, responded, "If you change the word 'testing' to 'assessment,' I can answer you: 'Assessments should be age appropriate, which for kindergarten includes activities which are familiar to children and which allow them to feel success at whatever level they are comfortable.'" Other teachers commented that assessment "determines where the child is at present and helps to determine what the child needs in terms of exposure and instruction in order to advance the child in the literacy process. . . . Assessment is needed to show progress the student has made, to show areas in which the child needs further instruction, and to help me see areas I need to concentrate on as a classroom teacher."

When asked "What types of assessment do you use?" the teachers shared a variety of measures ranging from the formal norm-referenced, standardized tests such as the MRT to the informal use of anecdotal records and checklists.

Administrative Support: Essential for Change

Until 1991, Virginia required standardized testing in first grade and continued to fund local school divisions' requests to use reading readiness tests in kindergarten and first grade. However, recent developments at the national and state levels created a window of opportunity for change in testing procedures and practices. Administrative changes within the city school system also created an atmosphere receptive to change. Within the last six years, each of the four elementary schools has had a new principal. One principal came from another school district which used some of the same literacy assessment tasks introduced by Sue. He participated in the course that developed the Language Arts Curriculum Guide. Another principal also worked on the curriculum guide and later became Director of Curriculum and Instruction for the city schools. All the principals have or had participated in various initiatives organized by Linda. Two attended the kindergarten teachers' workshops on assessment, three attended administrative workshops conducted by the University and two took a Foundations of Reading course from Sue.

When asked, "Have there been any roadblocks in moving away from standardized tests and toward more individual assessments?" the teachers replied, "No; the principals respect the supervisors and trust their opinion--if the supervisor says we need to do this, we do." The teachers perceived the principals as interested and supportive of change. Sharon and Diana said their principal "has attended every kindergarten meeting and has made an effort to learn." Merritt reported that although her principal had not been actively involved with the administration of the assessment, "he trusts his teachers to make the best decisions regarding assessment and instruction."

Developing Knowledge: Embracing Change

The stage was set for change. But to what? All were in agreement that the

MRT was not developmentally appropriate and were willing to use other measures to identify children for Chapter 1. The problem was finding appropriate substitutes for the MRT that would accurately identify at-risk children.

Rather than wait until teachers had acquired the knowledge from courses and workshops to select direct measures and experience using them with children, the decision was made to involve the teachers in learning while working with their children. Mayher (1990) describes this as "uncommon sense." He says, "Uncommon sense is based on learning as the result of intentional or purposeful action. The learning itself may be tacit or unconscious, but the motivation for performing the tasks which will lead to the learning has to be a sense of personal meaningfulness for the learner."

In May 1990, during early release time, Sue conducted a workshop for 21 kindergarten teachers, Chapter 1 reading teachers, and elementary principals to share her experience with assessments and to provide some training for administering these assessments and interpreting their results. Several teachers had requested the workshop after attending a state department early childhood conference where one of the speakers talked about early reading assessment tasks and showed video tapes of young children interacting with print. The impact of viewing young children in the early stages of reading and writing piqued the kindergarten teachers' curiosity and left them eager to learn more.

In this session, Sue reviewed the national and state initiatives supporting change in literacy assessment and provided further evidence that direct measures can accurately identify developmental delays. She also wanted to give teachers confidence in their own abilities to administer assessment tasks and interpret the results. Her work in the neighboring school district and as a member of the state department readiness assessment committee gave her credibility.

At this session, Linda asked for volunteers who would use some of the tasks with their students during the 1990-91 school year to report the results of their work at the next spring meeting. Each teacher agreed to select five students randomly and administer the tasks. In the interim, the standardized readiness test, The Metropolitan Readiness Test (MRT), was retained. It would be administered by each kindergarten teacher to the entire class in the spring of 1991 as part of the selection process for Chapter 1.

To provide the knowledge base needed by the teachers, she launched another set of initiatives; teachers were encouraged to enroll in the Foundations of Reading class taught by Sue. The class required teachers to engage children in literacy development tasks in their own classrooms and provided the theoretical underpinnings for the use of these tasks. In the summer of 1992, Sue offered another class concerning literacy development and assessment for K-3 teachers. A total of seven kindergarten teachers from Harrisonburg City public schools completed one of the two courses offered.

The Pre-Literacy Assessment: Creating Change

In the spring of 1991, Linda and Sue shared the results of the MRT with kindergarten teachers and the kindergarten teachers shared the results of their informal testing. They were amazed at how much more they knew about their students' early reading behaviors. They found the tasks much less frustrating. They requested the MRT be eliminated from further spring testing and requested a performance assessment to used in its place. The principals present at this meeting voiced their approval.

Since Linda is Chapter 1 Coordinator, and the assessment was considered part of the Chapter 1 selection process, no further approval from the Central Office staff was needed to support the change. However, Linda did justify the change and explain the process in the Chapter 1 Project Application which was approved by the Chapter 1 State Supervisor.

From the research literature and from her dissertation study and work as elementary supervisor, Sue selected five tasks that met the following criteria:

1. The task closely match behaviors needed in the beginning reading process;
2. The task have validity, the research supports its use in identifying developmental delays;
3. The task be one that can be administered by the classroom teacher with a minimum of training;
4. The task be administered in the same amount of time it took to administer the MRT; that individual administration time add up to the group administered time for the week; and
5. The tasks together accurately identify those children who could benefit from Chapter 1 services.

The tasks alphabet naming, concept of word, spelling, writing a message, and story retelling were introduced in both the graduate level courses which Sue taught and in the workshop sessions conducted for the kindergarten teachers. These were also the tasks the teachers used during the pilot study in May 1991.

During the 1991-92 school year, Linda and Sue prepared the Pre-Literacy Assessment for the kindergarten teachers' spring testing in 1992. They prepared summary sheets for scoring and reporting forms for recording the data. The assessment was to be introduced at a two and a half hour workshop on an early-release day in February.

Linda introduced the workshop with these comments:

> Two years ago this May, you participated in an introductory pre-literacy assessment workshop. At that time the Virginia Department of Education had established a working committee to study and make recommendations for early childhood assessment. We had hoped to get a jump start and volunteer to be part of the pilot study. As you are probably aware, the work of that committee is in remission. At the same time, we were concerned about appropriate measures to assist us in selecting and identifying children for Chapter 1 services. We made some progress toward that goal by developing a weighted referral system which combines teacher observation and a standardized score from the MRT. During the past year, you have had opportunity to use the Pre-Literacy Assessment in its entirety or selected components. Today, it is my pleasure to have Sue here to help us refine our process. Sue collected and analyzed dozens of samples of children's work while completing

her doctoral research at the University of Virginia. As an early childhood supervisor, she helped to develop a standardized measure using data from the pre-literacy assessments. Once again, we will benefit from her expertise and experience, as we develop our selection criteria based on direct measures rather than a standardized or indirect measure.

Sue began the workshop by reviewing the National Association for the Education of Young Children (NAEYC) guidelines for assessment of young children and by sharing the advantages of using the pre-literacy assessment:

> It is individually administered and may be given at any time during the day. The tasks should take approximately 15-20 minutes per child. It is a direct measure of what the child can do. The child feels successful and the teacher gains valuable information regarding the child's literacy development. The tasks are research-based and correlate closely with first grade reading achievement. They are also consistent with those tasks recommended in the Virginia Standards of Learning and our Language Arts Curriculum Guide. The information gained is most helpful in assisting with accurate Chapter 1 recommendations and in conferencing with parents.

Sue used local kindergarten students' samples of story retellings, spelling, and writing gathered during pilot tests the previous spring. The teachers added their own observations and raised questions that were relevant because of their pilot-test involvement. In addition to first hand experience, three kindergarten teachers, five Chapter 1 teachers, and four first grade teachers had completed Sue's graduate course in reading. They provided on-site expertise to those who were administering the tasks for the first time. This fostered a spirit of collaboration among first grade and kindergarten teachers that had not previously existed. At the kindergarten curriculum meeting during the summer of 1993, one kindergarten teacher reflected on the experience: "The first grade teachers never asked our opinion concerning reading development; now they were curious about the scoring and interpreting of the tasks we were using and it gave us something to share." In the same meeting, another kindergarten teacher said, "The hall separated us from the first grade and now first grade teachers are crossing that hall."

The logistics of administering the Pre-Literacy Assessment were discussed and the teachers voiced their concerns over the numbers of children to be tested in a two-week period. Sue offered to assist two teachers who had the largest classes and who seemed most anxious.

Demonstration and Feedback: Supporting Change

Sue and Linda visited the schools during the two-week period of assessment in May, 1992. They offered support, answered questions, observed the teachers administer tasks, and in some cases, when invited, demonstrated how to administer a task with a child. This ready access to the supervisors reinforced the collaborative nature of the venture. They were all learning together. When the teachers were asked, "If you have a question concerning the test or the process, who do you ask?"

They immediately replied, "Linda." Then they added, "and then a colleague or a first grade teacher."

To prepare for the May, 1992, follow-up session, teachers completed a written comment sheet evaluating the children's responses and the process of assessment. Test data were sent to the Central Office for review and analysis. The testing coordinator and Sue analyzed the data. Mean scores were calculated for the various tasks. Sue shared the division-wide mean scores for the various tasks and used samples to illustrate the scoring and interpretation of those scores. In small groups, recommendations for the next year were generated. The teachers' comments, questions, suggestions included:

- "Should the writing message be dictated?"
- "We would like to all use the same story for retelling."
- "We need classroom assistance during this assessment. Could we have classroom aides during this time? Parents in the room were not very effective."
- "Should the environment be free from language models--many children copy from writing in the room--some were more capable but how can you quickly motivate a writer to write a message?"
- "Need more specific directions for the sense of story task, can the teacher use any prompts?"
- "It looks like my class had low oral story retelling scores. I would appreciate more ideas on how to strengthen this throughout the year."
- "Need more specific directions."
- "Consolidate the score sheet, fold it together."
- "With no student teachers, it's difficult to test. Could we hire subs or have aides?"
- "It takes four weeks for a class of 24. Each part takes several days."
- "Communicate with parents--could there be a letter explaining tasks, giving indication of progress, and giving suggestions for assistance?"

When asked, "What worked well?" the teachers replied enthusiastically:

- "Taping the story retelling as you listen."
- "Have the children say the rhyme with you from memory before the teacher models reading."
- "One-on-one, stress-free situation."
- "Everything."
- "Alphabet sheet corresponding to the order of letters on the score sheet." "Like color-coded test sheets--easier to work with and sort."

From the discussion, the next steps were:

1. Additional training for teachers to deepen their understanding of literacy development;
2. Provide more instruction in specific task administration and scoring;
3. Rework the format to comply with teacher's requests; and
4. Clarify the writing sample task.

Linda and Sue did not meet to address these issues until February, 1993. They wanted an assessment format that was complete with instructions and would be easy to use. Therefore, they made the decision to postpone the writing sample assessment until they could provide further training and time to examine several early writing assessment scales.

Collaboration: Enhancing Change

At this same time, Nancy, the Chapter 1 Coordinator from a neighboring school division, shared with Sue a draft of an Early Literacy Assessment tool she had formatted on her computer. Nancy had taken the Foundations of Reading class with Sue the previous spring and was now participating in a Word Study workshop Sue was conducting. They had frequently consulted about the need to use appropriate measures in identifying Chapter 1 children. Nancy's district had not used the MRT since 1988, but relied on a kindergarten teacher checklist. However, the checklist did not include the tasks Nancy believed appropriate in assessing early literacy development. After one of the class sessions, Nancy gave Sue a copy of the Early Literacy Assessment she had designed for use in selecting at-risk four year olds for her district's preschool program. The format provided the model Linda and Sue needed to revise the Harrisonburg Pre-Literacy Assessment.

The format was perfected in two short weeks. Administration and scoring instructions were included in the assessment booklet along with the tasks. Packets of the newly designed and rewritten Developmental Literacy Assessment were sent to the schools.

Teachers called Linda to thank her for the changes. On May 18, several of the teachers met to review changes and reflect on the results. As the teachers shared their assessment results, they appeared more relaxed and confident. The new format met with overwhelming approval. The new assessment met all their demands to be more specific in directions for administration and scoring. A few suggestions concerning minor changes in the format were made. However, two concerns that had been raised the previous year were again shared: 1) parents are not always the best assistants, and 2) Share literacy goals at the beginning of the year with parents. Time ran out before solutions could be offered or decisions made. As a result, five teachers agreed to meet with Sue and Linda after school in June to explore the issues further and make recommendations.

New Directions: The Cyclical Nature of Change

In June, 1993, for two days, four kindergarten teachers (one could not come because of family commitments), Linda and Sue reflected on the product and the process. The teachers reflected on their own learning and growth in the process as well.

Teachers found the assessments accurate:

- "Yes, for the way they look at children and our understanding of literacy."
- "We feel the acceptance of our administrators--free to develop--to take charge and fly; a few years ago we did the workbook and did other stuff but no one gave you credit for laying the foundation for reading. Now they do."
- "The Developmental Literacy Assessment has made me more aware of language development and print awareness; I emphasize writing more."
- "Now that I know more about story retelling, I'm doing more of it in the classroom."

- "I feel more competent than I did three years ago. I wasn't ready for your course till last summer."
- "How many times do you have to work with the tasks before you feel comfortable?"
- "It's like giving you permission for what you wanted to do anyway."
- "The right kind of information has facilitated communication across teachers and grade levels."
- "Now the focus of our sharing is on what the kids can do, not just on social behaviors."
- "I don't feel comfortable interpreting results because parents don't have the knowledge."

Three major initiatives evolved from the discussion.

1. Linda felt she could write into the Chapter 1 project money for assistants during the end of year assessment period.
2. Sue took the suggestions and promised to work on a composite early writing assessment scale to pilot next year.
3. The teachers were charged to work an additional day or two to develop a parent information and communication plan to include workshops at the beginning of the school year, conferences in the fall and winter, and a letter explaining end of year assessments.

In a recent phone conversation, Sue expressed amazement at how much time they spent in developing the assessment tool for kindergarten teachers. Linda said, "So much of what we do is on the run that we don't have time for reflection. Yet, every time you take a shortcut in a critical part of the change process, you undermine the quality of the results." It is that understanding and insight that has guided the actions and produced the results in this city public school system.

Teaching Notes

Primary Topic: The process of change in awareness, attitudes and assessment tools in one school division
Secondary Issue: Appropriate assessment of literacy development in young children

Introduction

This case study represents a three year effort in one school division to move toward the development and use of alternative assessment tasks that provide teachers, prospective teachers and administrators with objective, accurate information regarding literacy development in kindergarten and first grade students. Assessing literacy development has been the focus of much research in the past decade (Clay, 1979; Morris, 1981; Ehri and Wilce, 1985; Teale et al, 1987). Yet, change in assessment methods has not kept pace with the research findings. Standardized reading readiness tests and reading achievement tests are still being used by many school divisions despite documented concerns. Many teachers and administrators are not informed as to the limitations of the tests and do not have the knowledge or experience in using alternative assessments. Some are not aware of the regulation changes in Chapter 1 that permit alternative assessments to be used for selection and evaluation purposes.

Through the use of case studies such as this one, preservice teachers can become familiar with the issues concerning assessment and identification of "at-risk" young children. They can become familiar with alternative assessments to the more widely used standardized reading readiness and reading achievement tests. More importantly, they can become change agents within the public schools if they understand the rationale for change and the process of change.

The experience gained from examining this case study can be applied to other educational issues identified from the research literature. Students can outline the steps needed to implement a new teaching strategy or tool to bridge the gap between research and practice. Moreover, students can prevent roadblocks by anticipating needs and by demonstrating ways in which those needs can be met.

In the following discussion guide, questions and activities are designed to stimulate student thinking and illuminate their understanding of both the process and product.

Discussion Questions and Activities

Background: Conditions for Change

1. What were the conditions that made the need for change apparent?
2. Can you think of other conditions that could have contributed to the change?

Key Players: Facilitating Change

1. Who are the key players?
2. Why were they key players?
3. What qualifications did they bring to this work?

Stakeholders: A Real Reason to Change

1. Describe the philosophical perspectives of these teachers.
2. How did the teachers' philosophical underpinnings influence the change process?

3. How might this process have been different, had the teachers seen teaching from another perspective?

Administrative Support: Essential for Change

1. How did the administrators facilitate change? Did they hinder change?
2. How did the teachers in this case perceive their administrators?
3. What factors contributed to this perception?

Developing Knowledge: Embracing Change

1. The acquisition of knowledge is as developmental for teachers as for children. Discuss some of the ways in which a common knowledge base was developed.
2. What are the implications for a staff development program?

The Pre-Literacy Assessment: Creating Change

1. What kinds of information were accessed in producing the alternative assessment tool?
2. Why were these particular tasks selected for inclusion?
3. Identify the events that caused the process to be set in motion?
4. How did certain events influence the project?

Demonstration and Feedback: Supporting Change

1. Responsibility and feedback are two conditions Cambourne (1984) cites as necessary for language learning. How were these conditions employed in this case?
2. What difference did they make?
3. How did timing and setting influence the process of change?

Collaboration: Enhancing Change

1. Why did the teachers accept the Developmental Literacy Assessment as an alternative assessment tool?
2. Examine a standardized readiness test. Compare and contrast the reading related tasks in the test with those on the Developmental Literacy Assessment.
3. Discuss the collaborative nature of the change that took place. Discuss the role of the key players and supporting players. Could the change in assessment take place more efficiently? How, and under what conditions?

New Directions: The Cyclical Nature of Change

1. Change is a recursive process. Explain what this means from your understanding of this case.
2. What are some themes that emerge from this case study regarding the change process?

Appendix A

Timeline of Project Activities

1992	
Feb.	Meet with Chapter 1 Director, City Public Schools to review process and select tasks to administer
Mar.	Prepare materials and conduct a two hour inservice with kindergarten and Chapter 1 teachers in administering the assessment tasks
Apr.	Administer assessment tasks to all kindergarten students; visit schools and assist with administration
May	Collect results from the tasks and analyze the data to determine Chapter 1 population
	Meet with teachers and administrators to share results, critique process and product, and make recommendations
June	Analyze assessment task data with Testing Director, City Public Schools
Sep.	Share pre-literacy tasks with undergraduate students enrolled in an integrated language arts block course
Oct.	Meet with Chapter 1 Director to review feedback from Chapter 1 teachers regarding selection process based on assessment tasks
Nov.-Dec.	Supervise undergraduate students in administering pre-literacy assessment tasks to selected first grade students in the city schools and comparing results from previous spring
1993	
Jan.	Consult with County Chapter 1 Demonstration Teacher regarding a pilot project using assessment tasks with kindergarten students
Feb.	Review recommendations from Harrisonburg teachers and meet with Chapter 1 Director regarding spring testing
Mar.	Consult with Nancy Mast, County Schools, regarding format, selection of tasks, and weighted scores
	Meet with Linda, City Public Schools, to prepare new format and revise tasks
Apr.	Meet with City kindergarten teachers to review tasks and format; prepare materials for distribution and administration
May	Analyze results and establish criteria for Chapter 1 selection
	Meet with teachers to share results and critique changes
June	Meet with Linda and selected teachers to review process and the Developmental Literacy Assessment
	Meet with Nancy to review results from The Early Literacy Assessment administered in the County and compare data with that from City Public Schools
	Prepare final case study

Appendix B

Harrisonburg City Public Schools
Developmental Literacy Assessment
Summary Sheet

Student ______________________ Grade ____ Date __________

Teacher ______________________ School __________________

DEVELOPMENTAL WORD KNOWLEDGE TASK (Spelling Inventory)

Categories	Score
• No attempt or scribbles - 0 points	0
• Random letters - 1-4 points	2
• Initial consonant - 5-9 points	4
• Early letter name - 10-14 points	6
• Letter name - 15-22 points	8
• Transitional - 23-29	10
• Correct (conventional) spelling - 30	12

Score ☐

CONCEPT OF WORD TASK (Voice/Print Matching)

Check (✓) Poem used: Sam, Sam _____, Way Down South _____, Little Turtle _____

Criteria	Points
• Child does not attempt to touch words as he/she says them; may slide finger across page in a rush	0
• Child points to individual letters as words	1
• Child starts pointing to words but gets out of synchrony with a two-syllable word or by omitting little words	2
• Child starts pointing to words but gets out of synchrony, then stops and starts again or attempts to self-correct	3
• Child points to each word as he/she says it	4

Score ☐

SENSE OF STORY TASK (Story Retelling)

Check (✓) Story used: The Three Bears ____, The Billy Goats Gruff ____, The Little Red Hen ____

Story Element	Points
• Beginning	1
• Setting	1
• Characters	1
• Description	1
• Feeling	1
• Sequence	1
• Conversation	1
• Ending	1

Check (✓) retelling behavior:
____ with much prompting
____ with little prompting
____ unaided

Score ☐

ALPHABET NAMING TASK (Letter Recognition)

- Upper Case
  Give one half point (.5) for each correct response — Total possible (13) _____
- Lower Case
  Give one half point (.5) for each correct response — Total possible (13) _____

Score ☐

DEVELOPMENTAL LITERACY ASSESSMENT **TOTAL SCORE** ☐

Source: Early Word Knowledge Test, McGuffey Reading Center, UVA. Adapted by Phyllis Y. Coulter, Eastern Mennonite College and Linda H. Bland, Harrisonburg City Public Schools (1993).

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DEVELOPMENTAL WORD KNOWLEDGE TASK

Instructions for Administering:

- Use lined paper provided. Encourage children to write their own name.
- Begin by modeling a "sound-it-out" spelling of the sample word mat on the board. Say the word aloud and ask, "What do I hear first in the word? What letter do I put down first? M, yes, that's it." Then write M on the board, and say the word again slowly, but not so slowly as to segment the sounds artificially. Then ask what letter comes next. "What letter do I write next?" A, that's right." A is then written on the board, and the last letter is dealt with in the same manner.
- Tell the children that you want them to do the same thing on their own with some words you will call out. Tell them that you are interested to find out what they know about words. Call out each word and follow with a short sentence using the word. Then repeat the word again. During the testing offer words of encouragement and appreciation for all efforts that the children make regardless of what is written.

SCORING CRITERIA

WORDS	0 Random Letter	1 Initial Consonant	2 Early Letter Name	3 Letter Name	4 Transitional	5 Correct
bump	m	b (d)	bp	bop	bomp	bump
lake	rlwrw	l	lk	lac	laek	lake
side		c or s	cd	sid	sidd	side
dragon		jrm	jrn	jragn	dragin	dragon
feet		f	foat	fet	fete	feet
net		n	nt	nat		net

Instructions for Scoring:

- Write the correct spelling of each word beside the child's production.
- Use Scoring Guide to determine points for each word.
- Add points for each of the words on the list to obtain total points.
- Convert the total points to corresponding category and score.

SCORING GUIDE

Points	Categories and Features
0	**Scribbling**
.5	**Random Letters**
1	**Initial Consonant** Initial consonant only is correct (mail = M or MORDE)
2	**Early Letter Name** Initial and ending consonants correct (back =BK or BTLK) Initial consonant correct and appropriate vowel but inappropriate or no ending consonant, (back = BA or BAT, mail = MA or MAR) (long vowels = letter names, short vowels: a = A, e = A, i = E)
3	**Letter Name** Initial and ending consonant plus appropriate long vowel letter name correct (mail = MAL, feet = FET) Initial and ending consonant plus appropriate letter name substitution for short vowels (a =A, e = A, i =E, dress =JRAS, stick = SEK) Initial consonant blends may be omitted Two syllable words must include appropriate vowel in first syllable and consonant letter in the second syllable or suffix, picking =PECN, peeked = PEKT

4 **Transitional**

Initial and ending consonant plus correct short vowel
Initial and ending consonant plus attempt to mark long vowel (mail =MALLE, feet = FETE)
Includes both letters in initial consonant blends (stick = STIC, dress = DRES)
Two syllable words must include correct short vowel or marked long vowel in first syllable and vowel letter in the second syllable or suffix (picking = PIKING, peeked = PEAKEd or PEEKT, the one exception)

5 Correct

CONCEPT OF WORD TASK

Instructions for Administering: Select one of the poems the child can recite by memory. Ask the child to say the poem to be sure the child knows it.

- **Teacher:** Show the child a printed copy and model the process. Say, "This is how the poem looks written down. Watch me touch each word as I say it." Touch each word as you say the poem with a natural rhythm.
- **Teacher and Child:** Have the child say the poem with you as you touch each word. Repeat task if child gets ahead of your pointing.
- **Child:** Ask the child to say the poem and point to each word as it is said. If unsure of the observation, repeat process.
- Determine the child's score using the criteria on the summary sheet.

SENSE OF STORY TASK

Instructions for Administering: Have the child select and tell one of the following stories: "Goldilocks and the Three Bears," "The Three Billy Goats Gruff," "The Little Red Hen." Say, "I'd like for you to tell me the story of ______." If the child hesitates or is having difficulty, say, "Tell me what you remember," "How did the story begin?" "What happened next?"

As the child retells the story, check each of the story elements the child includes using the scoring criteria. Give **one** point for each story element that meets the criteria.

Story Element	Criteria	Points
Beginning	Begins story with: once upon a time, one day the three bears, or something similar	______
Setting	Tells where the story happened: in a house, in the woods, or something similar.	______
Characters	Names significant characters: Goldilocks, the three bears, etc. (NOT "she," "he," "they," "it")	______
Description	Uses descriptive words at least twice: big, little, hard, or something similar.	______
Feelings	Describes at least one feeling of a character: tired, hungry, angry, or something similar.	______
Sequence	Includes at least three events in logical sequence.	______
Conversation	Gives at least one example of a character speaking.	______
Ending	Tells what happened at the end of the story: jumped out the window, ran away, lived happily ever after, or something similar.	______

Total Possible (8) Score ☐

Source: Sense of Story Task adapted from the Early School Inventory - Pre-Literacy, The Psychological Corporation, Harcourt Brace Jovanovich, Inc., 1986.
Word Knowledge Task adapted by Fordham, A. and Coulter, P. Source: Morris, D. & Perney, J. (1984). Developmental spelling as a predictor of first-grade reading achievement. The Elementary School Journal, 84, 440-457.

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ALPHABET NAMING TASK

Instructions for Administering: To introduce the task: Point to the letter and ask: "What is the name of this letter?" or "What do you call this?" and continue asking, if necessary, "What is the name of this letter?" or "What letter is this?" Be sure to move across the lines. **Note:** If the child hesitates, examiner may start with the first letter of child's name, and then go to the first line. Point to each letter in turn, working across the lines. Use a masking card if necessary.

Scoring Criteria: Give one half point (.5) for each correct response

Put a checkmark (✓) beside the letter to indicate a correct response. If the child responds incorrectly, record the child's response beside the letter. e.g. o✓ a✓ d b m✓ s✓ u n

Observe the way in which the child names the letters. Check **labored** if the child takes time to think, goes back and begins again, pauses and repeats previous letter, needs prompts for naming or experiences any difficulty or delay in retrieving the names. Check **automatic** if the child readily names the letters with little or no hesitation.

Upper Case

O	A	D	M	T	B
P	W	E	L	Q	I
F	J	N	G	R	H
V	C	Y	K	Z	X
		S	U		

Upper Case Score ______

Automatic ______ Labored ______

Lower Case

o	a	d	m	t	b
p	w	e	l	q	i
f	j	n	g	r	h
v	c	y	k	z	x
		s	u		

Lower Case Score ______

Automatic ______ Labored ______

TOTAL SCORE ☐

Source: P. Coulter and L. Bland.

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Case Study 3: TJ: Year Two: Starting All Over Again

by Dr. Paul J. Gerber, Virginia Commonwealth University

It has now been more than an entire school generation since the implementation of P.L. 94-142, the Education of All Handicapped Children's Act, and individuals with learning disabilities (LD) have come of age. As a result the field has begun to shift its attention to the issues of learning disabilities in adulthood. Employment has become an area of intense concern among the issues on the adult agenda, especially with the recently implemented Americans with Disabilities Act (P.L. 101-336).

Special Education programs have tried valiantly to plot the path to employment for students with learning disabilities through mandated transition planning. In fact, transition planning is required in the reauthorization of P.L. 94-142 in the Individuals with Disabilities Act of 1990. Those efforts have had mixed success because the pathways of school-to-work and school-to-school-to-work are not typically accompanied with the needed assistance and support to ensure the success of the transition process. More important, transition efforts are fraught with problems in documenting positive outcomes because there is a dearth of research regarding what actually happens in the workplace beyond the point of vocational entry. There are some helpful data available that generally point towards some positive trends in employment. Sadly, two major negative trends currently exist: high levels of unemployment and underemployment for people with learning disabilities (Brown, Gerber & Dowdy, 1990). In addition, the dynamics of the workplace for individuals with learning disabilities is not really understood. All in all, the field of learning disabilities currently lacks sufficient research on the effects of learning disabilities in the employment environments.

Research on Learning Disabilities and Employment

Few in-depth efforts to study individuals with learning disabilities in employment settings exist. Gerber and Reiff (1991) studied vocational issues and employability of adults with learning disabilities in a comprehensive ethnographic study. In a subsequent study, Gerber, Ginsberg and Reiff (1992) studied highly successful adults with learning disabilities in employment settings to find out how they made it "despite the odds." This qualitative study of 71 adults (ages 29-67) who worked in 40 different jobs, produced a model of employment success that to date is the only comprehensive explanation of the internal and external "alterable variables" that in toto facilitate vocational success not only in job entry, but in job advancement, and in the attainment of employment leadership roles.

TJ Case Study

In the first year of the TJ case study, Gerber (1992a, 1992b) sought to investigate the issues of a beginning teacher with learning disabilities teaching a class of students with learning disabilities. The themes that emerged from the data analysis were (a) goodness of fit in job selection, (b) disclosure of having a learning disability, (c) teaching performance and instructional factors, (d) support systems and job performance, and

(e) advocacy and change. In addition, the majority of alterable internal and external variables found in the high success study (cited above) were responsible for TJ's success.

The trials and tribulations of TJ's first year of teaching were unanticipated and unpredictable. However, he succeeded through persistence, hard work, and finessing the system in which he worked. It can be readily argued that TJ succeeded in part because of his learning disability and in spite of his learning disability. Employment success was not guaranteed because TJ knew that there are too many unknowns in the learning disabled experience. At the same time, being learning disabled made him instinctively and intuitively understanding of the students he taught. He possessed a unique perspective among teachers of students with learning disabilities.

After one year of successful teaching, TJ seemed to be on his way to a triumphant career in teaching. But a successful first year of teaching is only a beginning. Writing about TJ's first year, I said, "His accomplishments in year one portend the beginnings of a productive and successful career, but year two may not be easier, nor any year after that. This may be the fate of one who has a learning disability" (p. 230-31). The purpose of this study is to examine TJ fully in his second year of teaching--a year that was so different from year one that it seemed as if he was starting all over again.

The Informant, TJ

TJ is a white, 31-year-old male in his second year of teaching special education. He is an only child who grew up in a middle-class family in the Tidewater area of Virginia. TJ was diagnosed as learning disabled in elementary school and attended a number of schools during his school-age years. Most of that time, his parents, acting as his advocates, were "at odds" with the school administration about an appropriate special education placement. TJ's learning disability manifested itself in school as problems in long-term memory, spelling, and math computation. He also had epilepsy that was controlled by medication. All of these problems continue to be present in his adult life.

Upon graduation from high school, TJ got a job working in one of the large shipbuilding yards in Tidewater. His initial placement in the fabrication section of the shipyards exacerbated his epilepsy. Thus, he was transferred to a not very demanding or time-consuming office job. Nevertheless, his effectiveness was hampered by his dyslexia. In each of his jobs he did not fit in with his co-workers largely because of their attitudes and perceptions about his disability. In total, he spent five rather frustrating years going nowhere.

After being discharged from the shipyards, he began taking college courses at a local university. TJ went principally on the encouragement of the Norfolk vocational rehabilitation office who evaluated him and found him eligible for college funding. He took classes with a woman who worked with him in his shipyard office. After experiencing some success and gaining some confidence, he decided to go to school full-time and transferred to Virginia Commonwealth University (VCU) to study special education with an emphasis in learning disabilities. While at VCU, he accessed some of the special accommodations in instruction and testing that were available to students with disabilities. He became active in the Students with Learning Disabilities organization and became its president in his senior year. This placed him in an advocacy role with the Vice Provost for Academic Affairs.

While at VCU, TJ compiled an average grade point average. At times he struggled with his courses and ran into some problems in his practica and student teaching experiences. But he was the first known student with learning disabilities to graduate the VCU School of Education. He received a bachelor's degree in special education with a certification in learning disabilities.

TJ taught for one year in a learning disabilities resource class in a central Virginia school division. (See next section, *Setting*, for details.) In his first year his teaching performance received passing ratings by his principal and special education supervisor. Moreover, he passed the Beginning Teacher Assistance Program (BTAP) examination (now defunct) on his first try. This was significant because it was designed as a test for regular education teachers and not all teachers passed it on the first try.

Setting of the Study

The setting of the study is a school of approximately 250 fourth and fifth graders in a rural school district in the mountainous central part of Virginia. The school division has one primary school, kindergarten through third grade; TJ's school; a middle school containing grades six through eight; and a high school that has grades nine through twelve. TJ's school has 12 teachers and a principal. Special education and Chapter One programs are also part of the school's instructional program. He teaches the learning disabilities resource class and another special education teacher teaches a self-contained class of children with behavior disorders and learning disabilities.

TJ's school is surrounded by farms. It is located near a main highway that runs north and south through much of central Virginia. The county is noted for its agricultural output and light manufacturing industry. In a 1989-90 school division self-study, 30 percent of the mothers are listed as housewives. Reported educational levels of the county residents follow: 36.5 percent of the parents have less than a high school education, 47.3 percent of the parents have a high school education, and 16 percent of the parents have a college degree. The population trends in the county have been stable for many years.

TJ's classroom is located in a white temporary (trailer) classroom building adjacent to the school's main building. His classroom is approximately 16 x 10 feet with two-thirds of the space used for instructional purposes. His classroom adjoins the other special education class and both are separated by a wall with a common door. Educational materials, file cabinets, and computer equipment occupy much of the space, with student desks in the remaining space. There is no built-in closet space and everything in the classroom is exposed. TJ's two classroom computers are linked to the main school building. The classroom can accommodate five to six students at the same time.

New Personnel

In TJ's second year of teaching personnel changes included a new director of special education, a veteran special education teacher from the Tidewater area of Virginia. While she had considerable instructional experience, she had relatively little administrative experience. She knew TJ's parents from attending the same church in the Tidewater area. In fact, she heard of the job opening that ultimately became her new position from TJ's parents. She did not know TJ, however.

A new principal was assigned to the school from his position in the school division's central office. Prior to becoming principal, he worked in pupil personnel services. TJ had worked with him during his first year of employment. TJ was pleased with his appointment because the new principal had a richer understanding of the instructional needs of his students and the special education practices and procedures than his previous principal. TJ described him as "stricter and sterner than the previous principal. He had good expectations and was not easily manipulated." He was also sympathetic about the issue of mixing self-contained students and resource room students in TJ's resource program.

His fully-certified new colleague, the special educator assigned to teach the self-contained class, had taught students with behavior disorders for eight years. TJ was quite optimistic. He commented, "It will make a tremendous difference from last year."

TJ's second year resource program caseload grew markedly from his first year. He had three "self-contained" students and 16 resource students with learning disabilities. This caseload went beyond the allowable number of students to be served. (Exceeding the maximum number of students requires a waiver from the state department of education.) The self-contained students were "mainstreamed" into TJ's resource program for the entire day because there was an overload of students in the self-contained classroom. Moreover, included in his caseload were students who had behavior problems besides their learning disability.

Setting Differences from Year One

In year two, TJ's physical environment was similar to year one. The extraordinary difference was a new set of personnel who had an immediate effect on his work. Each person (director, principal, and special education colleague) had far more experience in working with special education programs than the personnel in year one. His new director of special of education had considerably more experience with special education programs than his previous supervisor whose main qualification was a master's degree in educational administration. His new principal held a far deeper understanding of the needs of students with disabilities and the system of educating them. Last, his special education colleague in year two was fully certified and very experienced in teaching special education. In year one his colleague was not certified and lacked teaching experience.

Another marked difference was the number and kind of students that TJ taught in his second year of teaching. During the latter part of year two, TJ had a caseload of 25 students that exceeded the legal limit (for learning disabilities resource and learning disabilities self-contained teacher). This caseload included three full-time students in his classroom in a "mainstreaming" effort. Frequently, his classroom had as many as nine students at one time. Moreover, TJ reported that students in year two had a greater diversity of educational and remedial problems.

Most significant, some of his students had behavior problems that necessitated increased attention to the issue of behavior management. In year one TJ's caseload started with 9 and crept up to 13. Typically, there were never more than five students in his class at one time. However, none of his students stayed with him for the entire day, nor did he have any behavior management problems.

Method

To study the employment experience of a second year teacher who is learning disabled and teaching a resource class of students with learning disabilities, I used an interview guide approach (Patton, 1990) as the chief data collection method. In addition, I observed TJ's class, though very infrequently, because I was restricted by an administrative mandate to collect data after school hours. When I did observe TJ's class, it was usually the resource period just prior to the dismissal bell. All data collection focused on TJ and did not endeavor to include social or cultural perspectives of his classroom.

I visited TJ ten times at approximately four week intervals between September 1992, and May 1993. I interviewed TJ's principal only once towards the end of the school year. The visits yielded 13 hours of audiotaped interviews (the principal's interview was not audiotaped) and field notes from three 45 minute classroom observations. Audiotaped interviews from each visit were transcribed along with complementary field notes.

Data Analysis

The data were analyzed in three stages (Miles and Huberman, 1984). Stage one entailed data reduction. Activities included categorizing data from interviews, abstracting quotations from interview transcripts, and interspersing field notes into the data. Particular attention was given to tentative identification of main themes and confluent issues pertaining to the central focus of the study. Data were summarized and themes were isolated.

Stage two focused on data display through charts and matrices listing low inference (e.g., teaching philosophy and stress factors) categories with quotes, field notes, and self-memos. As a result of this organization, patterns and themes emerged that led to higher order themes, those patterns that characterize the data across several categories in each of the matrices (e.g., change in support systems and work relationships).

Stage three culminated in drawing conclusions about the data and verifying the conclusions. I formulated my conclusions through the emergence of patterns and themes linked to the experience of TJ in his second year of teaching. These patterns and themes emerged through further clustering of the data and making the issues more discreet. For instance, "ambivalence" was combined with "stress" as one theme while "ambivalence" was subtracted from "shifts in support systems and work relationships" to become a theme unto itself.

Data were confirmed through a triangulation technique of using multiple data sources. I reviewed study findings with field notes and field note summaries. In addition, TJ read the manuscript for veracity. Changes were minor and few and were incorporated into the narrative.

The issues that emerged from the data analysis of TJ's second year of teaching were (a) self-disclosure to establish relationships, (b) change in support systems and work relationship style, (c) shift in educational practice and teaching style, and (d) stress and ambivalence about his job. The issues coincided with the findings from year one of the study, but differences did emerge. Furthermore, several alterable variables identified in the Gerber et al. (1990) study emerged in year two, most notably, reframing, social ecologies, persistence and desire, and learned creativity. Goal orientation, which was deemed absent in year one, was present to a minor degree in year two. In addition, goodness of fit that was a key alterable variable in year one was also present to a minor degree in year two. This occurred because TJ was limited in achieving a better goodness of fit because of the inflexible and overbearing system he was forced to work within.

Theme One: Self-Disclosure to Establish Relationships

As in year one of the study, self-disclosure became a starting point of TJ's second year experience. TJ seemed to feel that he must frame his relationships with others in terms of their understanding that he is learning disabled. He continued to be very direct about his disability. At the outset of his professional relationship with his new special education colleague, he disclosed that he was learning disabled. He recounted his colleague's supportive response: "She did not know that I was learning disabled, and she was surprised. I told her what my difficulties were, and she expressed that she thought it was terrific that I was teaching and that I overcame a lot. It was a nice change."

TJ's principal found out directly that TJ had a learning disability when TJ requested permission to be studied by me. However, the principal probably knew somewhat about TJ's learning disability already because he and TJ at times worked closely together last year. TJ's supervisor found out that he was learning disabled through discussions with his parents before she moved to her new job. Hence, the topic of TJ's learning disability never came up directly in their conversations. TJ expressed worries about his supervisor "not feeling he was competent" because he was learning disabled.

TJ decided that he would disclose his learning disability to his students in their first week of school. He spoke about his learning disability and about famous people in history and on the contemporary scene who were learning disabled. He told his students to talk to him if his learning disability created problems for them. He talked about learning to compensate for their learning disability and explained to them "that's why you are here." TJ recalled, "They didn't say much; they just listened and took it in stride." Some, he thought, were too young to understand his message. However, he did think that over the year "they might see his problem as a handicap." Moreover, he spoke specifically about his problems with spelling and demonstrated how he used a Franklin speller. He told them there was an extra Franklin speller in the classroom for their use.

TJ felt somewhat more guarded when it came to parents. TJ said, "I am going to play it by ear. The only reason I'd talk about my learning disability is if it were an issue. Probably many know about it already." He went on to say, "I would let it be known if I'd talk to a parent's organization, in an organized setting--but no other reason, really."

All in all, in TJ's second year he was more at ease disclosing his learning disability to all those connected with his work: "Saying that I have a learning disability is no issue this year. I feel I have proven myself after one year and a big burden is off me. I have shown that I can do it, and I feel confident now. I can say I did it last year. I can do that."

Theme Two: Change in Support Systems and Work Relationships

In TJ's second year of teaching, personnel changes altered his support system. His constant outside source of support, his parents, offered ongoing encouragement, advice about work relationships, and technical assistance on writing projects. His new and very experienced special education colleague was his greatest source of support at school. TJ stated early in the school year, "Things will be quite different from last year. It's great to have someone to bounce ideas off of, and she comes to me as well. We are going to work well together." In fact, TJ seemed to have found the support he most sorely missed in his first year. He observed, "Now I feel I'm not alone. Now I can go to someone for support and direction. Now I have a mentor."

And his colleague did act as a mentor to him to a large extent. She was "always there as a sounding board." TJ always spoke of talking over new ideas and approaches with her. Moreover, she checked over his psychoeducational testing reports at the beginning of the year. Most important, she was the on-site person who seemed to always be there for TJ to "settle him down" and "provide back-up." At the end of the year, TJ spoke glowingly of his colleague: "If it hadn't been for her, I would have struggled a lot more. This year she was the saving grace--a big blessing. When I was down on myself, she picked me up."

TJ gave his principal mixed reviews in terms of the amount of support he received from him. He observed that "he felt his principal's support but wondered about it from time to time." Thus, TJ learned to be selective about what issues to pursue with his principal and which ones to drop. Unlike the previous year, all of TJ's concerns and questions were not attended to by this principal. "I can't depend on him [the principal] for support. It seems he just wants to play it safe. I just don't feel that I have the backing that I need. It makes me feel more alone than last year."

Overall, the relationships TJ had with "old guard" and new teachers were noticeably positive. He reported greater cooperation. He felt teachers were more accepting of his ideas and his ongoing consultation. Scheduling his resource and self-contained students was complicated, but all the teachers worked with him to make it work.

In addition, TJ began to establish communication with the middle school to support students who were to be mainstreamed when they left his school. When teachers complained about him, his principal would tell him but then leave him to work it out. TJ seemed to appreciate that. However, it was not uncommon for TJ to interpret complaints as a lack of support. From time to time, when he perceived lack of support most intensely, he thought "Most teachers want me out of here" and "Things are worse than last year."

TJ did see his principal in different ways at different times. Generally, he viewed him as stricter and sterner and not easily manipulated. During my first visit, he spoke about a "little run-in," but he felt that "he had 100 percent backing." TJ related how this principal would "take care of more details" and tried "to tackle things head on." Above all, TJ felt his principal knew of his difficult caseload and teaching situation. The principal visited three to four times a week but "did not offer any suggestions." Ultimately, however, the principal played an important role as intermediary in TJ's rocky relationship with his supervisor.

It was very difficult to pinpoint the genesis of this poor relationship with his supervisor. At the beginning of the school year, TJ exclaimed, "She has it in for me, I don't know why." There were countless incidents from the start. TJ reported that the director of special education reprimanded him on numerous occasions in front of his students, peers, and principal. It seemed that his supervisor was determined to shape his behavior by exclaiming, "I'm not going to hold your hand and do it for you" and "Didn't you learn anything the first year?" There were run-ins over materials, testing, report writing, and "asking the wrong questions." TJ was at a loss to remedy the situation, although the relationship seemed to get somewhat better towards the end of the school year. TJ viewed the problem as a struggle of "making sure he was doing it the way she wanted it." He thought his supervisor viewed it as "a recurring pattern of inconfidence."

TJ did have a feeling that, despite being in special education and being a teacher of students with learning disabilities, his supervisor did not understand him as an individual with learning disabilities. She even criticized him for working too late in the school day which prompted him to comment, "How she can 'pick on her own' is mind-blowing to me." The cumulative effect of TJ's supervisor's actions and words was a feeling of non-support verging on harassment. This taxed his relationship with his principal and his support system of his co-workers.

Theme Three: Shift in Educational Practice and Teaching Style

The significant changes in TJ's resource room caseload from year one to year two required a dramatic overhaul of TJ's educational practice and teaching style. In essence, TJ had three groups of students with learning disabilities and each group was quite different. The students TJ taught in his first year were used to his instructional system and made steady progress. The new group of resource students had a wide array of academic needs. However, it was the three students who were with him the entire day (the self-contained students) who posed the most challenges and problems. TJ observed, "They need so much more." The sheer number of students taught at one time (five to seven and sometimes nine) in a small classroom setting never really allowed him to implement a program that met his standards. TJ lamented, "I'm having to dish it out quickly and go back and forth. It's frustrating not to be able to give the time I need. It's like fast-food teaching. I am pulled in so many directions. I teach phonics, math, written language with four books in my arms--walking around dishing out commands to all the kids. It's as much as I can balance."

It was difficult for his students to work in small groups because behavior management became a problem. He collected and bought a variety of new instructional materials for his class. (TJ was given $225 to purchase new materials.) He audiotaped portions of instructional programs and used the educational computer programs extensively for the first time. Still, it was difficult to meet the individual needs of the students in his class. "I need to explain, but then the others need help. I stop with them and help [name withheld]. Then I start again and [name withheld] needs help. Basically, I am giving work and then running around and making sure they do it. I see little way around it. I am learning to accept it."

Ultimately, TJ's approach became a balancing act of educational trade-offs. "I give lots of time to the self-contained kids, but they really don't want to work. When I am working with the resource kids, I'm constantly breaking away from their lesson. I find myself disciplining the self-contained kids and that takes away from the resource lads." However, he had great concern for his self-contained students. TJ said, "Sometimes I hope my resource kids are absent so I can spend more time with my self-contained kids."

Toward the end of the school year, TJ evaluated his students' progress. "Last year's students are doing well. The new kids are not doing as well. I'm not taking as much time to explain things to them. Therefore, they aren't doing as well. Last year I talked to the students more about challenges and about learning disabilities."

Ultimately, TJ had to settle on making peace with himself in relation to his class. "The kids are important. I'm going to do the best I can and hope and pray that my hard work will win out." Deep inside, it seemed that TJ did have doubts about his program. He voiced a concern that stemmed from his goals for his students. "We're not preparing them for the regular classroom very well. There is too much individual work and not enough seat work going on in this class. Not only that, with the needs of the kids it's hard to fit the content areas in. That's hurting mainstreaming efforts."

These thoughts did boil over into utter frustration at times. It was common to hear TJ voice feelings such as, "My expectations of what I can carry through is going by the wayside. There's too much distraction. It's just hellacious. If I had a choice, I wouldn't do this again. They think I have all I can handle, but they keep giving me more."

Theme Four: Stress and Ambivalence About His Job

In TJ's second year of teaching a prominent theme emerged involving stress and ambivalence about his job. It is hard to know whether stress caused his ambivalence or vice versa, but there is no doubt that there was a strong interrelationship between the two. Often times, this theme gave the impression that TJ was struggling. But there is ample evidence to suggest that the system thrust this quest for equilibrium on him. As TJ commented, "Every time I look around I have more and more to do." He was even asked to continue to do all the psychoeducational testing for the special education referrals in his school.

His job became more difficult in year two. He was trying to carry on a resource program with "self-contained" students in his class. TJ lamented, "I am trying to teach them like resource room kids, and it doesn't work. The 'self-contained' kids don't understand, and they want more attention. They are more distractable. I have two books on one arm, and on the other arm I am looking at math. At the same time I am looking over someone's shoulder monitoring. Monitoring is not easy for any teacher. I can do it. My learning disability doesn't hinder monitoring. But it doesn't help either. Two things are easy to monitor but four or five things, that's more difficult. It pushes me to focus even more."

TJ also served as a back-up to his special education colleague. Whenever the situation got "out of hand," he would be called into her class to help get the class under control. A male teacher was very helpful when difficult behavior episodes occurred. Frequently, TJ had to physically restrain students until they calmed down. It seemed that the building principal was rarely called for help. This interrupted and disrupted TJ's class. Students in the other class would occasionally cool off in TJ's crowded class before returning to their own class. When asked if his program would run easier with an aide, TJ smiled and said, "That would be nice, but where would the aide fit [physically] in my classroom? Bottom line is that they need another teacher. Other school systems have self-contained classes for both students with behavior disorders and learning disabilities."

His relationship with the director of special education was another source of stress and ambivalence. She did not understand his needs and the relationship deteriorated over most of the year. TJ interpreted her behavior and comments as "a lack of confidence in him" and "a doubting of his competence." TJ had exchanges with his supervisor and came away remembering statements such as "I'm not going to hold your hand and do it for you," "Didn't you learn anything the first year," and "You may feel that LD is my only responsibility but it isn't."

The source of the problem with his supervisor was difficult for TJ to understand. The scenes in public were very perplexing to him. "She's cut me down in front of my students, parents, and my [fellow] teachers. I just can't figure it out." TJ did seek to understand why she did this to him. Conversations with his principal were helpful. TJ observed, "I feel better when I know what's going on." Reflecting on input from school division colleagues, TJ commented, "I am asking because I am not confident, and I am asking because I want to know if I am doing it like she [the director of special education] wants it. Last year it was hands off; this year it's attention to details, a more restrictive system."

As the year progressed, the instructional content became more difficult. This challenged some of TJ's content area knowledge and caused problems. TJ observed, "Now I realize what I didn't learn at VCU in such areas as math. I am trying to help kids so they can go in the regular classroom. Last year I was teaching the basics. Things on a fifth and sixth grade level are a different story." At the time of those comments, TJ was teaching himself a specific math division technique. As he put it, "The textbook kind is not the way I learned it." In addition, he was having problems teaching fractions. "In some calculations with fractions like 11-3 5/9 I have difficulties. I have to go home and study. If a child said, 'I need help now,' I couldn't help him."

Stress exacerbated the specific problems evidenced from his learning disability. TJ related, "I have been reversing letters and numbers because I have been under stress.

I put claws and paws in the wrong order and other things out of sequence. Sometimes I look all over the workbook, and I can't find what I am looking for, and sometimes I put age and grade on test forms in the wrong spot. Spellcheck and WordPerfect save me!"

The stress and ambivalence peaked at various times during the year and without predictability, occurring more frequently as the school year progressed. To some extent, the intensity of TJ's workload fostered these feelings. TJ commented, "I'm working hard, eating and drinking, to get things done. This year I wanted to go back to college and play more tennis, but that will have to wait."

At one point in the year, TJ was working until 6:30 in his classroom. His supervisor noticed his classroom light on. She called and told him he should not be working that late. Whether she was being a supportive and empathetic boss or not, TJ took the comment as a criticism and exclaimed, "If she really understands learning disabilities, she should know that it takes longer for me to do the job."

It seemed that when TJ faced stress on the job and its accompanying ambivalent feelings, he took comfort in searching for another job. He would not be working at this school the following year, he stated. "One thing that is keeping me going is that I am not going to be here. I don't know what I am going to do if I am. If I have to chose between teaching and another job, I may not teach. There is too much stress and too much work." TJ submitted applications to a number of school divisions. He chose to apply near his parents' and in the greater Richmond area, near his alma mater, VCU. The sheer hope of getting another teaching job gave him strength. It also prompted his principal and supervisor to respond in a more supportive manner in TJ's opinion. However, this increased his ambivalence about his current job and to a lesser degree his profession.

Epilogue to Themes

As year two came to a close, I asked TJ to comment on his teaching experience. TJ began by saying, "It is hard to say if this year was better than last because it had so many challenges." Because of the changes in personnel he observed, "It was like going to a new school system--new styles and support." Having said that, he emphatically stated, "This year was worse than last. Although I gained, I also lost a lot. I learned to work with teachers, and I matured a lot. Last year they doubted me. Now more teachers are asking for hints for the learning problems of their students. But now I have more problems with my supervisor, things are up in the air with my principal, the size of the class is worse, and the behavior in the class is worse. I had none of this last year."

Amidst the mixed reviews, TJ voiced definite signs of a teacher who was maturing in his profession. TJ commented, "This year has taught me that I can handle a real difficult situation. I can handle 'self-contained' as well as resource." His principal gave him an annual evaluation that was filled with glowing ratings, writing a letter of recommendation for TJ's placement file describing TJ as "superb."

Periodic teaching evaluations, both formal and informal, became confidence building measures for TJ. His evaluations allowed him to think that he could handle most situations in either a resource or self-contained classroom. Despite the negative interactions with his supervisor, he was progressing. TJ readily observed, "Now I am getting more confident. I don't want to be perfect; I still want to be skeptical of myself, but now if I were successful in another situation, I think I could do it. It would remove my self-doubt and improve my self-confidence."

At the end of his second year, TJ was "hell-bent" on finding a position in another school division in Virginia. TJ spoke of this frequently in the latter months of year two. He had spoken of this same goal in year one. As his third year approached, TJ had not found a position in another school system. In year three he would be right where he started his teaching career--doing much of what he had done in year one and particularly year two--again.

Discussion

It was during TJ's second year of teaching that he consoled a new teacher in his school saying, "Next year will be better." In that moment of consolation, TJ may have hit upon the key to his success as a teacher. Despite his woes and his self-doubt, intuitively he knows that if he sticks with it, things will get progressively better, if only a little bit at a time.

How can his experience be denied? It is the life experience of a person with learning disabilities--the story of TJ from childhood to adulthood. Difficult times punctuated each level of development, but with perseverance, the final result was positive.

TJ's second year of teaching was a year of triumph. It is a reminder that the successes in TJ's first year of teaching were not an aberration. Perhaps there was even more triumph in year two because of the drastic changes. In a multiplicity of ways, he seemed to start all over again. The changes and surprises are enough to challenge anyone, learning disabilities notwithstanding. Could the formula for success in year one be the key to year two? So much was different, and so much had changed. TJ had to find out through trial and error what worked and what did not work all over again. It was yet another example of an effort to reframe his learning disability once more. The ingredients for success seen in year one (such as desire and persistence, reframing, seeking a new goodness of fit, developing new social support systems, and using his learned creativity skills) worked for TJ again. His mastery of this "blueprint" for success portends a career that seems equal to almost any challenge.

It was not surprising to see an overlap of themes from year one to year two (Gerber, 1992). In fact, there is a great deal of validity in this finding alone. It is very possible that there will be similar and recurring themes dealt with annually. This will become part of TJ's style and experience. In effect, TJ will always be confronted with changes in his work, ranging in importance from subtle to significant. If he responds in future years as he responded in year two, then he will have established a pattern of adapting that fits his learning disability--one that accentuates his strengths and mitigates his weaknesses. Most important, he has developed a professional identity that can be characterized as a teacher who is learning disabled rather than a person with learning disabilities who is a teacher. Now, limits he imposes on himself will set the boundaries for him and his students.

In his prophetic statement of support to his first-year colleague, TJ speaks to himself as well--one year at a time. Building confidence and leaping hurdles, finding out more about himself as a professional with learning disabilities and realizing that, to some degree, each new school year is a year of starting over again. It is part of the pleasure in accomplishment and achievement, and it is part of the frustration and the pain.

Teaching Notes

Primary Topic: Transition and Learning Disabilities
Secondary Issue Areas: Vocational Entry Disabilities in Employment Settings

Introduction

The case of TJ is unique in that it provides a year-long perspective on the transitional issues of work in the second year of employment. This study follows part one, which studied TJ in his first year of teaching. It is important to know that currently in the field transition is defined without temporal criteria and its endpoints and/or outer bounds are conceptually fuzzy. Transition can be an enigmatic process and this case is no exception. As demonstrated, year two proves to be quite different from year one. Despite the focus on TJ in year two as the case to be considered, it is important to keep in mind that the transition process for TJ is still evolving, although it is probably nearing its end.

TJ's case is an example of how events and themes unfold when a person with learning disabilities takes his rightful place in the workplace. The concept of job entry is spoken of frequently in the transition and employment literature for individuals with learning disabilities. Yet, the nuances of the process are absent in the literature. Learnings of that process are often relegated to the personal experiences of the person who struggles with the trials and tribulations of a new job. They are infrequently shared and rarely analyzed.

Employment for a person with learning disabilities is very complex, teaching a class of learning disabilities notwithstanding. Beginning employment in any vocational area is chocked full of many difficult issues involving the individual, the system, the culture of the workplace, and their interactions. Analysis of only one piece of the mosaic is not fruitful. Fully considered, all elements of the case provide a realistic and enlightened view.

This case provides general contextual information and themes for analyzing case issues which are likely to gain complexity in discussion and analysis. It is possible that the discussion issues are not truly mutually exclusive. The reader is urged, then, to refer to the case of TJ in his first year of teaching to gain broader insights on year two. Finally, this case is not written as a case for problem-solving, although that can be an objective of the discussion. Therefore, the discussion should be largely analytical in nature.

Discussion Guide

Background Information

TJ's second year of teaching is colored by his pre-teaching experiences. It is important to establish a discussion that frames TJ's experience during this school-age years, his work experience at the shipyards, his years of university training, and his first year of teaching.

Questions:

1. What about TJ's past experiences as being learning disabled should be utmost to TJ in his relationships with students, colleagues, parents, and supervisors?
2. What about TJ's own school age experiences does he not want to duplicate with his students?
3. TJ has "made it" as a successful teacher. Should we always have to factor in his learning disability to his experiences and his performance as a teacher?

Readings associated with this block include the topics: adults with learning disabilities, transition and learning disabilities, successful adults with learning disabilities, the Americans with Disabilities Act of 1990, Section 503 and 504 of the Vocational Rehabilitation Act of 1973, and the case written about TJ's first year of teaching (see references).

Self-Disclosure to Establish Relationships

Participants should note TJ's thinking about self-disclosure, how he did it, how he might have done it, and the risks of his self-disclosure strategy.

Questions:

1. Critique TJ's method/strategy for disclosing his learning disability to his students.
2. What other approaches could he have used?
3. Is he jeopardizing his credibility by disclosing his learning disability to different groups of individuals under different conditions at different times?
4. Analyze the risks of TJ's self-disclosure.

Readings for background on this time include the topics: self-disclosure and disability, self-advocacy, and reframing the learning disabled experience.

Change in Support Systems and Work Relationships

The importance, creative use of and limits of support systems should be explored. Attempt to understand what went wrong with his supervisor and some strategies to turn around that relationship.

Questions:

1. Analyze the disparate elements of TJ's support system.
2. What seemed to be the genesis of the friction between TJ and his supervisor of special education?
3. Was it TJ or his learning disability (or both) that fostered such a rocky relationship with his supervisor?

Readings for background on this theme include the topics: support systems in work groups and social skills for individuals with learning disabilities.

Shift in Educational Practice and Teaching Style

TJ adapted his teaching style because of his redefined teaching role in year two. In his view, this altered his philosophy of instructional delivery in special education. This leads to an examination of his instructional practices, their effectiveness and efficacy in his new role.

Questions:

1. Did TJ "sell out" his principles by changing his philosophy of delivery of instruction to his students?
2. What could TJ have done differently to accommodate his new instructional challenge in his second year of teaching?
3. What do you think will happen over time as TJ's thoughts about what is needed for his learning disabled class and what actually is occurring show little coincidence?

Readings for background on this theme include the topics: the special education resource room, Virginia's Special Education Law, prerequisites for successful mainstreaming.

Stress and Ambivalence About His Job

There is no doubt that there is stress associated with TJ's job. The degree to which it is job-related or learning disabilities-related needs to be explored. TJ shows ambivalence about his job performance and his relationships with colleagues. Examine the source of this ambivalence.

Questions:

1. What ideas do you have to reduce TJ's job stress?
2. In what ways is TJ's job stress related to his learning disability?
3. How does TJ's idealism or high expectations about teaching students with learning disabilities lead to his stress and ambivalence about his job?

Readings for background on this theme include the topics: stress management and teaching, the experiences of beginning teachers, and the imposter syndrome.

The Hypothetical New Teaching Position

Since this case is not one written for problem solving per se, it is wise to incorporate the elements of synthesis and closure to this case. Given what we know about TJ's second year of teaching (and possibly his first year), what kind of "fit" should TJ seek in another teaching position. Focus on a job that reflects TJ's strengths and weaknesses, his needs in relation to his learning disability, and the kinds of conditions he should seek in order to feel comfortable and successful in his job.

Questions:

1. If you were to advise TJ on finding a new job that "fit him" what elements of fit would you advise for a good match?
2. Is there any position that you can foresee that negates TJ's issues of being an adult and/or teacher with learning disabilities?
3. How should TJ "sell himself" in obtaining a new teaching position?

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Case Study 4: Math Connections: A Collaborative Effort

by Dr. Shirley A. Smith,
Marymount University and
Gregory Tsoucalas,
Academic Resources Coalition

Introduction

This case study presents the perspectives of a six-member planning committee who worked together over several months to establish a mathematics lab at Taylor Elementary School. The reflections are of the six planning team members; the elementary principal, the classroom teacher, the district mathematics supervisor, the PTA president, a parent who is also the director of a community volunteer tutor group, and a university professor are presented.

The case study is an entire script with reflections from each of the six members. Reading the total script provides a more global view of the collaborative process. Selecting and reading an individual participant script allows readers to see the process from any one of the six perspectives separately. Appendix A describes each of the team members. Other Appendices, referred to throughout the text, present actual documents from the planning effort.

Taylor Elementary School is one of twelve elementary schools in a Public City School District near a large metropolitan area. With over 100 student growth per year, the demographics of the total student body of 540 is: White, 52%; African-American, 30%; Other (Hispanic/Asian), 18% Taylor operates a full-time program for gifted and talented students in grades 4-6 and two learning disabled (LD) classrooms, one primary and one intermediate. Next year, Taylor Elementary School is losing its 6th graders to the Middle School and will become a K-5 building.

This year Taylor Elementary School's 6th grade students scored higher on standardized math tests, on average, than any other school in the district. However, individual scores show a wide gap between the highest and lowest scores. This school, while located in a fairly affluent neighborhood, draws approximately a 40% at-risk population.

First Meeting: February 1993

Since this was our initial meeting, there was no formal, written agenda. Harry Unger opened the meeting by outlining the course of events that led up to our meeting. Each member voiced his/her perceptions of the idea and how a math lab at Taylor Elementary School might operate. Dr. Thompson provided background information concerning a request for proposals that might apply to our endeavors. The group supported drafting a proposal to document our collaborative effort.

Reflections: Dr. Brenda Thompson, University Professor and Designated Project Director:

The major advantage of the lab will be having greater control of my students' field experiences. Often, our students are placed in situations where they do not see appropriate modeling, or they do not have the freedom to practice their skills and implement their ideas. In the lab setting, under my supervision, they will observe the proper use of manipulatives in math instruction and work with small groups of students.

With regard to this planning group, we need direction. I will talk with my colleagues in Human Resource Management to get some ideas on the process we should use in working together. I'm still not sure who will emerge as leader of the group. I don't think the principal will continue to let Mr. Unger lead us. It doesn't look as if she cares enough about the idea to assume leadership herself. It seems to me the future of this project lies in our ability to secure the minigrant.

One Month Later (March 1993)

We got the grant--I can't believe we got the grant! This was the third time I have written a proposal for a grant, and the first time I have been successful. I know it's only for $3,000, but to me the recognition is more important, especially since I am up for promotion this year.

Reflections: Mr. Harry Unger, Academic Resources Coalition Director and Parent

Because I'm prime investigator for this project, the school principal let me direct the first meeting. In preparing for this meeting, I wanted to be sure I didn't come across as threatening to anyone's control. I think principals and teachers are wary of parental involvement in general, and because of my outspokenness on the take-home reading program, I thought they might be particularly wary of my involvement with this project.

We reached a turning point when Dianne Davis (District Math Specialist) said she had a particular concept of a math lab and wanted to know my concept. I said I had no particular concept in mind as it was outside my area of expertise. I told her I wanted her, as the expert, to develop (with Dr. Thompson) the kind of program she would like to have, to consider me a facilitator. I want the experts to do what they are capable of doing, with appropriate support.

Often, experts only know one way of doing things; and when that avenue is closed, they give up. These times call for unconventional methods, and I know that public educators lack experience in such methods. Hence, I took the initiative. In doing so, it would be easy to confuse my intentions as wanting to force my style of math instruction on the school and school system. I think I've begun to allay Dianne's fears. I told her my job as facilitator was to solve problems, resolve communication bottlenecks, and figure out how to finance the math center. (A1)

Laura Smith's (classroom teacher) commitment to the project worries me. As it became apparent that we were venturing way beyond the initial $1,200 PTA gift, I reiterated my feeling that we didn't need the PTA grant. I made this point several times during the meeting to motivate us to "think big!" At the end of the meeting, Laura said, "Okay, so I can tell the teachers they've got the PTA money?" When we said, "Yes," Laura said, "Great!" and got up and left. Perhaps I am being too suspicious in thinking that the $1,200 was all she really wanted in the first place. (A2, A3)

I must say that I was particularly pleased to see Dr. Thompson more than hold her own with Dianne and Laura. In fact, Dianne and Dr. Thompson are emerging as the key players in this project. It is clear to me I don't have the expertise in math instruction to influence or motivate the school or administration. Dianne appears to be an extremely serious, thoughtful person in contrast to my sometimes flippant style. Brenda, while displaying a more personable side to me, can meet Dianne on this more serious plane. (A4)

Reflections: Ms. Helen Troast, Principal, Taylor Elementary School

I am a little leery of how this math lab concept will fit into the total curriculum of our school. Our school district has already defined a math lab by our magnet school. I don't want the parents to think we can duplicate that here. That could undermine the whole magnet school concept. Also, we are lacking the resources and expertise they developed with support of the school system at large. Harry worries me because he has all these wonderful, but not-carefully-planned-out ideas. We need to develop this idea further and come up with a clear plan before I can go along with it.

Reflections: Dr. Dianne Davis, District Math Specialist

I am not sure what these parents want. If they want a math lab similar to the one at the magnet school, I know there are no funds allocated for that. If the topics in the lab are determined by what is occurring in the regular classrooms, then my role will be to insure credibility of the curriculum. Our discussions of lab content vacillated between having games and reinforcing skills to providing enrichment with certain broad topics. I also had difficulty distinguishing the goals of the evening tutor program from the after-school lab. This blurred vision causes me to fear that it might become a place without substance. (A5)

Reflections: Ms. Laura Smith, Classroom Teacher

When I wrote the short proposal to the PTA suggesting that we use the money for math manipulatives, I never expected something like this to come of it! Although I'm glad Mr. Unger had the same idea of using the money to purchase math manipulatives, I question the feasibility of some of his ideas.

I am excited about the possibility of setting up a math lab at our school. In my "travels" around the school and in talking with other teachers in the Math Specialist Program, I have certainly seen a need for more good math instruction. It's not that teachers are not interested in math, but they are not familiar with the techniques, strategies, and new materials available. Many teachers have come to me for ideas, so I know that there is a need out there.

After my two-year math specialist training, and in working with my own students, I see the power of manipulatives in introducing and reinforcing concepts. We definitely need more of this in the K-5 classroom, and I hope this project will encourage the use of manipulatives.

Reflections: Ms. Nancy Dobbs, PTA President

When we first offered the $1,200 grants, I had no idea that it would grow to something of this magnitude. I sure hope Harry can find more funding for this project because the PTA cannot fund the whole thing.

I wish all my children's teachers were like Laura. She is so competent, well-organized, and really cares about her students. I know that if she is involved with the math lab it will be something worthwhile for the Taylor Elementary students.

Second Meeting:

AGENDA

I. Management Structure

*A. Review strategic planning principles**

B. Set meeting dates and times

II. Conduct Internal and External Scans

III. Refine Mission Statement

IV. Generate List of Key Issues

Please consider the answers to these questions prior to the meeting.

Our overall goal, as stated in the grant proposal, is to develop and implement a viable and sustainable elementary-level mathematics laboratory at minimal cost.

How would you refine or clarify that mission statement?

Identify resources, both within and outside the school district, who could help in the development of the math lab.

Identify those factors you see as a threat to the project.

List current questions you have regarding the establishment of the math lab at Taylor Elementary School.

****The process we will use follows the strategic planning principles of John M. Bryson and J. William Pfeiffer, and especially those outlined in the text Organizational Transitions. See references below:***

Beckhard, Richard, and Reuben T. Harris. Organizational Transitions, 2nd Ed, Addison. Wesley Publishing Company, Reading, MS, 1987.

Byron, John, M. Strategic Planning for Public and Non-Profit Organizations, Jossey Bass, San Francisco, CA, 1988.

Pfeiffer, J. William. Shaping Strategic Planning, University Associates, San Diego, CA, 1989.

Reflections: Dr. Brenda Thompson, University Professor

Our second meeting proved to be a most productive one.

1. We agreed to call our math lab the Math Connections Center to differentiate it from what the district has already defined as a math lab.
2. We identified resources from both within and outside the school district to help in the development of the center.
3. We openly discussed factors that might threaten our progress.
   a. Disagreements/misperceptions about our mission
   b. Bureaucracy of system
   c. People who are interested in "control"

4. We identified several key issues that still need to be resolved.
   a. Where will the center be located in the school?
   b. Who will own the materials?
   c. How will we empower the teachers?
   d. When should we publicize the collaboration?
5. And, we clarified our mission statement.

Our goal is to develop and implement a viable, sustainable Math Connections Center that will:

1. **Be integrated with the current elementary classroom instruction,**
2. **Serve as a resource for after-school and evening tutors, and**
3. **Provide training for teachers and volunteers in the use of manipulatives for developing math concepts and skills.**

Reflections: Mr. Harry Unger, Academic Resources Coalition Director and Parent

From the outset, the difficulty in arranging this meeting bothered me. I was convinced that we could not afford to let the committee meetings become hostage to the principal's demanding schedule. I confronted Helen Troast, the Principal, concerning the situation and she agreed that Laura Smith could be the school's representative at the meeting and provide feedback to her.

I am confident Dianne, the district math supervisor, is committed to the project. I perceive her to be more comfortable and I recognize her role in developing the concept of operations. I also feel that she and Brenda have clearly ascended to the dominant roles. To some extent they appear to be kindred spirits. That's reassuring to me. We all knew prior to the meeting that we'd been awarded the grant. I was mildly surprised that the principal had not mentioned it to her staff, although I understand why she would want to tell them herself. (B1)

The classroom teacher, Laura's absence bothered me for two reasons. First, because of my concern about her wanting the $1,200 PTA money. Second, I'm curious why Helen, who espouses teacher empowerment, would allow the meeting to take place in the morning when Laura can't attend because of classroom duties. The talk of empowering teachers went a little beyond me, perhaps because of cynicism I developed in previous contacts (or lack thereof) with teachers.

Helen asked that we not publicize the grant or inform the PTA until she had a chance to tell the teachers. I assume she will do that promptly. Issues of control and materials' ownership arose and may prove troublesome in the future.

I'm in a very unusual and somewhat uncomfortable position here. In the past I felt I had to carry the ball on all fronts when trying to implement some program at or for a school. I often lamented the lack of competent people to share that burden so we could work in parallel and bring programs to closure more rapidly. Now that I have competent people, particularly in Brenda and Dianne, I am uneasy. I am used to control and moving things along at breakneck speed. Maybe it is fortunate that I lack the technical expertise necessary to structure the lab and am therefore prudently refraining from interfering. However, I'm struggling. (B2)

Prior to Third Meeting:

As our next meeting approaches, I'm concerned with several things. One is my reputation. I'm staking a lot on making this process a success. I'm also concerned about the principal's seeming lack of action/decision making. Whether it's control, ownership, incomplete vision of the project, or just too much other work, I'm not sure. (B3)

Maybe the way to deal with the principal's concerns, whatever they may be, is to say "Give us a room, we'll equip it and use it afternoons and evenings. You use it however you wish during the day without disassembling it!" I'll bring this up at our next group meeting.

When I try to reflect on why I am disappointed in Laura's, Dianne's and Helen's lack of enthusiasm for this project, I have to ask myself what incentive they have to work on this project. I can't really think of any. They won't get promotions for a successful project. Why should they work hard on what seems to be such an amorphous project? (B4, B5)

I decided to talk to the superintendent to get his support for the project. I commented that while other non-school district personnel have been difficult in the past, there are others of us who have the desire and ability to help. My point was we can't keep throwing out the baby with the bath water.

Reflections: Ms. Helen Troast, Principal, Taylor Elementary School

When I read the memo from Brenda, I was disappointed that we didn't mention Laura Smith as an internal resource since she trained at the University of Chicago Math Program. I see the math connection center as a way to work with those faculty members who aren't yet using manipulatives in their classrooms. But, it could also become a vehicle to involve them in decision making and the administrative activities of the school.

Reflections: Dr. Dianne Davis, District Math Supervisor

Communication about the lab within the school is critical. Teachers must intimately understand the purpose of the lab and the way it will operate, know which of their students are participating, know what content is being addressed, and be made to feel welcome to participate in the lab. If this is not the case, the lab will be a threat to them. (B6)

Reflections: Ms. Laura Smith, Classroom Teacher

NOTE: *Laura was unable to attend this meeting of the planning committee. However, the proceedings were taped for her. These are her reactions after listening to the tape.*

This second meeting about the "Math Connections" (new name!) project raised as many questions as it answered. I'm not clear on my role, or the roles of the other members. I'm not sure if the center will operate during the school day or after school, or if it will provide enrichment or remediation. They spent some time talking about these issues but never came to closure on anything.

Because I will be responsible for classroom instruction for my gifted and talented classes, I'm not sure how much I can commit myself to after-school activities. I hope we can resolve some of these issues during the summer. Our meetings so far have been mostly discussion of philosophy rather than "How will this project happen?" I'm more interested in the "How to."

One good thing did come out of this meeting--they decided to spend the $1200 from the PTA on manipulatives for the classroom teachers rather than placing them in the Math Connections Center. So I get to survey the teachers and order the materials for next year.

Reflections: Ms. Nancy Dobbs, PTA President and Parent

My concern is that the principal has not yet notified the teachers about this project. I already informed the parents at our last PTA meeting and interest is high. Helen wants the teachers to hear it from her first. I hope she tells them soon.

We need someone like Dianne to inspire us--parents and teachers--to use manipulatives effectively to teach math concepts and skills.

Harry upsets me when he talks about moving the math center to another school. I realize some of the other schools in the district may be needier than Taylor and that their principals might be more receptive, but I don't think a project like this would succeed in another school because they don't have the parental support we do. Why can't we implement the math center successfully at Taylor first and then try at other schools?

Third Meeting

AGENDA

I. *Agreement on Mission Statement*

II. *Agreement on Individual Roles and Responsibilities*

III. *Conduct Gap Analysis and Discuss Strategies for Filling Gaps.*

IV. *Outline Action Plan*

V. *Discuss Progress on Key Issues and Any New Ones.*

Reflections: Dr. Brenda Thompson, University Professor

Although our meeting at the administration building was productive, we still need to complete our mission analysis in order to achieve a "shared vision" of the Math Connections Center before we can develop an action plan. Members were asked to read the description of their roles and responsibilities (Appendix B) and confirm their commitment to the project. Laura reported the partial results of the teachers' needs survey. This gave us an idea of the possible types of manipulatives to include in the center. While working on our shared vision of the future, we brainstormed ideas concerning the physical make-up of the center, the types of manipulatives, curriculum, and training we might provide. After a lengthy discussion concerning the feasibility of coordinating our efforts with the regular classroom teachers, we decided to rearrange our goals to show that this phase of our efforts will come later.

Our goal is to develop and implement a viable, sustainable Math Connections Center that will:

1. **Serve as a resource for after-school and evening tutors,**
2. **Provide training for teachers and volunteers in the use of manipulatives for developing math concepts and skills, and**

3. **Coordinate with the current elementary classroom instruction.** (C1)

There are three things we need by the next meeting:

1. The completed report of the survey of teachers' needs,
2. A set of all math curriculum materials used in the elementary grades, and
3. An inventory of manipulatives already in use at Taylor Elementary.

They say that change occurs slowly in education. I'm trying to figure out why this is so. It seems the school personnel keep putting off tasks assigned to them. Maybe we need to state definite deadlines. For example, we talked about surveying the teachers three months ago. At the meeting today, we had no complete report because only a few teachers returned the survey form. Is this because they have other priorities or general inefficiency? During the second meeting we asked for an inventory of manipulatives currently used by teachers. We have no list. Doesn't the principal keep these kinds of inventories? Maybe they don't want to admit that the parents are right and that manipulatives are not being used during math instruction. (C2)

I was appalled to discover that Dianne, a full-time district supervisor, does not even have her own office or her own phone. Her desk is located in a large room with at least six other desks, including the secretaries'. School administrators keep talking about empowering teachers and yet they continue to treat them as day laborers. If I were a supervisor in this district, I would be confused by the mixed messages about the professionalism and prestige of my position. I am thankful that the university climate is much more aware and responsive.

One Week Later:

Harry and I had a conference call with Pat Hodges, the director of a math lab in another elementary school. She agreed to share her expertise on setting up and maintaining a math lab. She provided valuable information we will share at the next meeting. I have also ordered two copies of the new Marilyn Burns book, About Teaching Mathematics, A K-8 Resource Math Solutions Publication, 1992, for the committee to share.

Reflections: Mr. Harry Unger, Academic Resources Coalition Director and Parent

I think our school and administration participants are more energized, so I guess the superintendent is committed to the effort, or at least wants to give me every opportunity to make it a success.

I think I was finally successful in getting Dianne to stop worrying about funding and design the ideal math center. No one really knows how to do it! This is the school district's equivalent to the classroom teacher dilemma of not knowing how to use parents and other volunteers properly. Not perceiving involvement as a problem, it is ignored. Well, we must make a breakthrough here, and I think I have to lead the charge. Dr. Thompson is certainly capable of doing so, but she's too much an outsider to be effective in mobilizing the school/district personnel. Besides, it's not her job to enforce things and I'm afraid she may one day say, "Why am I knocking myself out?"

A Few Days Later:

I've since called Dr. Thompson and told her to let me know what she needs and I will get it for her. If I have to come up with a strawman proposal on what a lab should look like, I will. It may be easier for Dianne and Laura to edit a plan rather than create one.

I'm in a quandary as to how to get things moving. I called Pat Hodges, the director of a math lab at another elementary school in the district. When I lamented that no one seems able to "start" our center, she said that she "just did it!" This is just the attitude we need, and ideally it should come from a teacher. Lacking that, I'm probably in the best position to lead this charge. (C3)

Brenda Thompson and I had a conference call with Pat Hodges that lasted about a half hour. It was amazing how we were on the same wavelength! We asked Pat a bunch of questions concerning how to set up the math lab (Appendix C). To get things started, Brenda and I said we wanted a lab that could serve a full class of 24 students simultaneously. Pat said she would make up a list for us of materials, quantities, and age group appropriateness (Appendix D). She and Brenda talked of the Marilyn Burns approach and her new book on teaching math. Pat has the book and Brenda has ordered copies. Clearly, I need to read it. Pat said she put together plans for a couple of school district Chapter 1 math labs. Wonder why we never heard about this from Dianne?

A day after our conference call I went to Pat's lab to see the storage cabinet/shelves Dianne had commented on earlier. They looked good to me and I asked her to get me a catalog reference. I also borrowed her Marilyn Burns book.

I read a lot of the Burns book and feel it can be an excellent practical guide. In fact, lesson plans or projects from the book can probably be used verbatim. I should have read it long ago, since I now feel I can talk a little more competently about "problem solving as focus" and teaching the "why" rather than just the "how to." I often told my son (3rd grade) when he was learning his multiplication tables that they were not the essence of math, rather that knowing how to apply math to real problems was key. I was happy to see Burns say the same. Now that I've read Burns, I am starting to formulate how our center can operate. I'll still need clarification from the school.

I noticed in yesterday's school newsletter (Appendix E), Helen Troast mentioned Taylor Elementary was investigating a relationship with Sacred Heart to set up a math center. I'm glad that's now out in the open. Interestingly, she also mentioned they were working on a math demonstration project as well as some other projects. I wonder why she didn't tell us (or Nancy) about these other projects, particularly if they might be related. Perhaps I view our work as more encompassing.

Today, I talked with Brenda about using a practice teacher from Sacred Heart to student teach at Taylor and run the lab after school. Perhaps we can pay the student to run the afternoon lab or maybe the student could work two less hours in the classroom. This idea offers a lot of potential. Dr. Thompson can be the practice teacher's supervisor. Maybe we can concoct a very special practicum for two students that, while in addition to being more work, will also provide them with exceptional opportunities to network; e.g., exposure to Laura, Dianne, Helen, and the superintendent. We can also say that successful completion of the practicum will guarantee an afternoon or evening job running the center.

A practice teacher would be in the best position to make the math "connection." If the student teacher works with, say, the third grade teacher(s), she'd see what they are doing in science, etc., and could relate the math center work for the third grade classes to that work. Perhaps we can have practice teachers in all grades and have after-school programs for each grade or perhaps some combination of grades.

Reflections: Ms. Helen Troast, Principal Taylor Elementary School

This meeting was really an inconvenience for me today because it was held at the administration building. I don't think other people realize how difficult it is for a principal with a school the size of Taylor to get away from the building in the middle of the day.

Brenda distributed individual slips reminding us of our role and responsibilities in this committee. Who is she to tell me what I should be doing? I don't have a problem with any of the items listed, but I'm concerned about the amount of clerical work this project might generate. I will also need to inventory all the math manipulatives we presently have in the school.

We spent a great deal of time talking about the training for the tutors. They must understand:

a. The rationale for using concrete materials,
b. The math curriculum, and
c. How the math center "fits" into the total curriculum.

We still need to decide who will implement the training. I'm sure Diane, Laura, and Brenda could handle it. They mentioned using the Marilyn Burns videotapes, too. I know the district has copies. Harry says he plans to recruit "expert" volunteers. I'm not sure there is such a thing. It seems to me there will be two levels of adults in the lab; volunteers who are less knowledgeable, but interested in helping, and people like Laura and Brenda who will supervise the program. I'm concerned about how we will evaluate the program within the first year. Will we try to track student progress as a means of evaluation? (C4)

Reflections: Dr. Dianne Davis, District Math Supervisor

Harry keeps telling us to "think big," but I wish we knew how much money will be available to us. Must there be "hand-made" materials or can commercial materials be purchased? Will there be enough money to adequately pay a professional for directing the lab? The parental role will differ dramatically in each of these scenarios.

Reflections: Ms. Laura Smith, Classroom Teacher

Dr. Thompson has given us each a list of responsibilities, which should help in the implementation of this project. Mine look O.K., although I would like some kind of timeline so we know where we're going and when.

Questions to be addressed at our next meeting.

a. Will there be a room for storage?
b. How will this project be related to the curriculum?
c. Who will supervise the grad students?
d. Is this enrichment or remedial?
e. Afternoon or evening?
f. What about using computers? Math Explorers?
g. Multi-grade levels?

Reflections: Ms. Nancy Dobbs, PTA President and Parent

I assume we can use Sacred Heart education students to staff the center after school until some of our parents receive training. I am concerned about how Dr. Thompson will ensure that these college students will do an adequate job.

I favor access to the math connection center for all students. If we gear our efforts to just enrichment or just remediation, we will not be serving the majority of students at Taylor.

Fourth Meeting

AGENDA

I. Complete Vision of Present and Future State

II. Conduct Gap Analysis and Discuss Strategies for Filling Gaps

III. Outline Action Plan

IV. Schedule Another Meeting for Sometime in July

Reflections: Dr. Brenda Thompson, University Professor

Brenda was unable to attend this meeting.

Reflections: Mr. Harry Unger, Academic Resources Coalition Director and Parent

In Brenda's absence, I conducted this meeting. No one seemed to reject the approach I took on materials and equipment. I gave members a week to review and respond to the list Pat made up. It's been several weeks. I have not heard anything, so I am assuming the list is set. Actually, Dr. Thompson has not seen the list. She'll have final approval. I'll drop off a list to her today.

Interestingly, when I distributed the list, I gave Dianne Davis an advance copy. At the meeting, as Laura was looking at it for the first time, Dianne said it was a "pretty standard list that you (Laura) or I could have come up with." I agree, but the question in my mind is "Yes, but why didn't you?" That's why I have to go outside to get help!

Maybe I'm being unfair. Maybe I never asked Dianne, Brenda, and Laura to come up with a list by a specific date. Maybe that's the only way to get it to happen, or at least to be able to complain legitimately if it doesn't happen. I need to be more attentive to this.

I was also concerned after the last meeting about how Nancy views the PTA's role here. She seemed to think we should get the parent volunteers together and tell them we want their ideas on how to make this work. Personally, I don't think we can afford to have a history of acting that way. I subsequently addressed this concern with Nancy and I believe we are on the same wavelength.

Helen was the most refreshing and surprising aspect of the meeting. She seemed much more supportive and upbeat than previously. I believe we will have a room available, even if it's given over to alternative use during the day. We also talked about offering a stipend to Laura to teach the after-school classes. I got the impression Helen would be very comfortable with this arrangement. She even suggested ways to make the offer more attractive to Laura by offering her more time off at the school, etc.

The idea about using an actual teacher, at least initially, sprang from the apparent realization that the Sacred Heart students' education courses would not be completed prior to teaching in the lab. This was never the plan, and I'm not sure how they got that impression. I thought Dr. Thompson and I were very clear about that. I guess the lesson here is to reiterate all aspects of the plan to insure clarification and gain approval at each step of the process. The problem, of course, is one of communication, specifically stemming from the fact that Brenda and I (and to a lesser extent Nancy) are the only members of the group communicating with each other outside the monthly meetings. The lesson here is to document in detail everything we've "agreed" to and review it frequently. (D1)

Helen's actions occasionally perplex me. More than anything else they contribute to my divergent mood swings concerning the project's success. I'll call her four times and leave messages but never get a return call. I'll call the fifth time (over several days) and she's extremely positive. I come away from the discussion feeling really good. Maybe I shouldn't take it personally, but it frustrates me all the same.

Reflections: Ms. Helen Troast, Principal, Taylor Elementary School

I definitely want to discuss with Laura the possibility of her supervising the instruction in the Math Center. Although she expressed some willingness, I'm sure much would depend on details such as compensation, responsibilities, and support. Harry is talking about bringing in someone from another school. I frankly would not want an outsider supervising our students, especially if we can rely on Laura. (D2)

Reflections: Dr. Dianne Davis, District Math Supervisor

I respect Harry's zeal in wanting to take charge of school reform initiatives and the hard work he has put into the task. Prior to our first meeting, I thought that the lab would be a joint effort of the total committee. My perception, however, was that any ideas offered within the group must first "pass muster" with Harry before they could be placed on the table. This was particularly evident today since he ran the meeting in Brenda's absence. As a result, I am still unclear about my role and/or the purpose of the committee's work. (D3)

Reflections: Ms. Laura Smith, Classroom Teacher

Our meeting went well, although several of my questions could not be answered because Dr. Thompson was unable to attend. She's a key person in this project!

The list of manipulatives looks good--I said I would help order them this summer. I need to talk to Harry about sources for funds and deadlines for ordering.

I got some good ideas from the teachers on what their needs are. I hope that will help in our ordering of manipulatives. We still need to decide whether the manipulatives will be available for teacher use during the school day. We'll need an inventory of manipulatives already in the school. (I have the feeling I'll be doing that!) We need to discuss the role of parents (PTA) in making manipulatives and in a volunteer capacity. I also hope we'll decide on the role of the graduate students.

Reflections: Ms. Nancy Dobbs, PTA President and Parent

Success of this program depends on Sacred Heart's providing us with student teachers to staff the center. We won't be able to keep the center in operation with just volunteers. We can't afford to pay a full-time teacher at this time.

Fifth Meeting

AGENDA

I. Finalize Action Plan: Develop Specific Strategies

   A. Scheduling students in Center

      1. Times/dates
      2. Groupings

   B. Coordinating program with classroom instruction

      1. How much coordination
      2. Communication vehicle

   C. Staffing Center

      1. Teacher(s)
      2. Sacred Heart students
      3. Parents and other volunteers
      4. Stipends

II. Expansion

   A. Use of computers

   B. Long range plan

   C. Possible future funding

Reflections: Dr. Brenda Thompson, University Professor

After deliberation, we decided to begin by offering an after-school, math-enrichment program for all interested students in Grades 3-5. We will run at least three 4-week sessions and the classes will meet two days a week for one hour right after school. We have decided to limit the classes to a total of 20 students each session and break the students up into two groups of 10. (E1)

The PTA will provide snacks. In the past, the PTA has used a similar model to successfully offer the Hands-On Science Program. We still need to work out the guidelines for selection of students for the program. We want to make sure that girls, minorities, and at-risk students are equally represented.

Laura and I will supervise four education students each session. They will work in pairs to implement lessons we have prepared. (In the future, I plan to have my students plan lessons too.) For some reason, I get the feeling that the others, particularly Harry, do not trust my students. I know they are not certified teachers yet. Originally they were going to use volunteer parents, who may or may not have any training at all!

We've decided to use a thematic, problem-solving approach. We've chosen Geometry, Measurement, and Patterns as our first three sessions topics. The key is finding activities that complement what is being done in the regular classroom.

I am really excited about working closely with an elementary school again. University teaching is extremely rewarding for me, but I really miss the young children.

Reflections: Mr. Harry Unger, Academic Resources Coalition Director and Parent

Well, today our agenda calls for some decisions about the structure and staffing of the classes. Without these decisions, I am afraid this project will flop around forever. While I like the idea of having Laura teach the course and Sacred Heart students assist, I'm still concerned about classroom integration. Without money for a full-time instructor, it becomes the classroom teachers' responsibility to use it. Our task is to encourage them. The question is "how?"

I envision Pat developing a course for teachers with help from Dianne and Brenda. In addition to classwork at Taylor's math center, teachers in this course will work one or two sessions in Laura's after-school center; then they will plan and conduct one or two sessions for use in their own classrooms.

Ideally, we will get a few volunteers among Taylor's staff to take the first course. Some of Dr. Thompson's students and parent helpers may audit the course. Then we assign Dr. Thompson's students to help set up and conduct the lab! Parents can help as well! I'll present my vision to the group today and hope for consensus.

Reflections: Ms. Helen Troast, Principal, Taylor Elementary School

This was by far the most productive meeting we have had to date. I feel much better now that we have the specifics worked out. I know that Harry is not happy with all our decisions, but he has to learn to work within the parameters of the school and compromise sometimes. I sure hope he can find some alternative funding sources so that we can pay Laura a suitable stipend for supervising the program. (E2)

There are still several unanswered questions that will have to be resolved before we begin.

1. How will we evaluate the success of the program?
2. How will we select the students?
3. How will we maintain the center if we do not receive additional funding? (E3)

Reflections: Dr. Dianne Davis, District Math Supervisor

For me, the feeling of collaborative effort was stronger at this meeting than at any other. I've frequently felt unclear about the purpose of this lab. Today, the group reached closure on this issue. This was the first meeting where I had a real "vision" of the lab and each person's role. It is the first time that I felt part of a true brainstorming session.

The topics/themes such as geometry, patterns, probability and statistics, etc., mentioned yesterday help me see this lab as a place for teachers to more extensively explore curriculum topics. Teachers may or may not align their choice of classroom mathematics topics with the lab topics. If not, students may experience a topic in the lab before it is addressed in the classroom. In those cases, students' lab experience will affect their level of need when the topic is taught, making it even more important for the classroom teachers to adjust instruction to accommodate student knowledge.

I thought Nancy's idea of offering a stipend to teachers to direct a four-week session was excellent. If we do that, we'll need a selection process that ensures proper expertise and willingness to follow through. If an activities proposal were a requirement, the quality of the proposal could serve as the criteria for selection.

Those moments when the group "gelled" were exciting and worth the time and effort. The opportunity to work on a task with colleagues from the public school, a PTA representative, a college professor, and a parent who initiates school reform is unique and powerful. I now believe pairing public schools with pre-service college programs holds real promise.

Reflections: Ms. Laura Smith, Classroom Teacher

Well, we finally are making progress. Today, we decided to focus on the Grades 3-5, to provide enrichment in an after-school program, and to use four graduate students to help implement lessons planned by Dr. Thompson or myself.

Reflections: Ms. Nancy Dobbs, PTA President and Parent

Maybe not this coming school year, but next, I can envision a time when teachers use the math center during the day to help individual students. Hopefully, Sacred Heart education students might be available to staff the center during regular school hours under the direction of Laura or Brenda. I am sure I can recruit several trained parent volunteers to work with teachers. Only then will the center be fully utilized and integrated with the classroom curriculum.

We talked for quite a while about training people, teachers, and volunteers to use manipulatives in mathematics instruction. We need to realize that the strategies used to train experienced teachers will be very different from those used to train volunteer tutors or pre-service teachers. (E4, E5, E6)

EPILOGUE

Development of the Math Connections Center at Taylor Elementary School continues. The manipulatives inventory (see Appendix C) was agreed upon and ordered; custom storage units are under construction, and Mr. Unger is securing Apple II GS computers on the secondary market. The eventual goal is to equip the math center with as many as 10 computers.

Initially, the center will be used for after-school enrichment programs. Each four-week session will cover a different topic and will meet two days a week for one-hour periods. Classes will be limited to 20 students each session--2 groups of 10 students. Using a problem-based approach, Laura Smith and Dr. Thompson will develop the first three topics--Geometry, Measurement, and Patterns. Laura will be the primary instructor for these programs and will receive a stipend of $2,000 for the year. She will be assisted at each session by two of Dr. Thompson's graduate students, and Dr. Thompson will supervise one session a week. Initially, programs will be offered to the upper (Grades 3-5) elementary grades. The student selection process is currently being developed.

One long-term goal is to integrate the center into the school curriculum, for greatest utilization of resources. Since we cannot afford to have a full-time math center instructor, our best alternative is to encourage as many teachers as possible to use manipulatives in mathematics instruction. We plan to invite them to training sessions and hopefully provide a recertification credit course.

While the documentation of this collaborative effort affected the process of the committee in both positive and negative ways, progress was slow, but eventually successful. The true test will come in the fall when we begin to implement the Math Connections Center.

Teaching Notes

While the math project described in this case study continues to evolve, and appears to be headed for success, it experienced several roadblocks and detours. Most of the difficulties were due to either poor communication, lack of trust, or absence of strong project leadership.

As you read through the case, there are numerous examples of committee members privately expressing confusion about their respective project roles and expectations. Yet these concerns were rarely discussed during committee meetings. Also, there were instances when everyone thought consensus was reached, only to find that committee members came away with varying ideas about what was agreed upon. Finally, on several occasions non-school district participants identified and contacted external resources, only to discover that school district participants were aware of these resources from the onset. It was not clear, however, whether district personnel saw no potential role for these outside sources, or that they made no connection between these resources and the project at hand.

Trust influences whether parents and other non-school district personnel will attempt to work cooperatively with school personnel. Trust is needed among all parties. Teachers and school administrators are, by definition, the education experts and are charged with responsibility for the institutional education of children. However, they can be perceived as unresponsive to offers of assistance. Teachers and administrators who have had firsthand experience with non-school district personnel who have been less than cooperative may become defensive. Unfortunately, this attitude often undermines trust and discourages prospective volunteers.

In this case, there was some wariness and questioning of motives among the members of the committee. This is revealed in the reflections of some of the participants. Yet, success seems to rest in overcoming early suspicions and developing a trust that carries this project forward. It is important to realize that, while difficulties have occurred in relationships of school districts and non-school district personnel, the abundance of competent, educated, well-meaning volunteers willing to work collaboratively cannot be ignored.

Many project difficulties stemmed from initial confusion about getting the math lab started and simultaneously documenting the collaborative process. As a result, school officials maintained control but too often deferred to Dr. Thompson, who was developing the case study. Progress accelerated when project leadership came from those most affected by the project's outcome, the school system personnel.

In the following discussion guide, specific teaching points are keyed to pertinent sections of the case study text (A1, B2, etc.). These points provide specific evidence of the communication, trust, and leadership issues. Questions are structured to promote discussion and to help draw conclusions regarding courses of action.

DISCUSSION GUIDE

A. First Meeting Discussion Questions

1. Why might Mr. Unger have felt the way he does towards the teacher after the first meeting?
2. What might the teacher have been thinking? Should she have done anything different?
3. Why was Mr. Unger willing to give up the $1200 grant from the PTA so early in the process?
4. Do you think Mr. Unger's concerns and actions were appropriate given the circumstances as he perceived them? As the teacher, what might you have done to influence his perceptions?
5. How would you describe the principal and the math specialist's view of the school district? What are their concerns? Are their concerns understood by the other committee members? What might they have done differently to get their perspectives across?
6. In one or two words, characterize each of the participants--Dr. Thompson, Mr. Unger, Dr. Davis, Ms. Dobbs, Ms. Smith and Ms. Troast. Who were the most influential actors, why? What motivated each actor to participate?

B. Second Meeting Discussion Questions

1. You'll note that Mr. Unger acknowledges his distrust of teachers in general; yet, if we are to believe his descriptions of his actions, his interactions with committee members would not have revealed this. Do you think this is true? What actions might suggest these unstated attitudes?
2. Why would Mr. Unger think the issues of control and materials' ownership might be troublesome? What issues do Mr. Unger's behavior and reflections suggest about himself and his relationship to the school?
3. Given Mr. Unger's penchant for action, how might you make him more comfortable with a slower pace while convincing him of your dedication to the project?
4. What are Mr. Unger's perceptions of Ms. Smith, Ms. Troast, and Dr. Davis? Are they accurate?
5. How could you, as the teacher on this committee, recognize this situation and avoid it?
6. As Dr. Davis points out, communication about the lab within the school is critical if the teachers are to use it effectively. What are some specific ideas for implementing the math center that would help teachers in the building accept the idea and make best use of the center?
7. Several members of the committee seem concerned that the principal has not yet informed the teachers about this project. Aside from the confusion over when to publicize it to the PTA and the community at large, why would Mr. Unger, Ms. Dobbs, and Dr. Thompson be concerned?

C. Third Meeting Discussion Questions

1. Why do you think the planning committee decided to rearrange their goals to make the coordination with current elementary classroom instruction their last priority?
2. Do you agree that change occurs slowly in education? If so, what can we, as educators, do to speed up the process?

3. The fact that Mr. Unger contacts an outside resource to help with the selection of materials is an indication that things are not moving fast enough for him. What else does it tell you about him? How do you think the other committee members felt when he presented them with the proposed list?
4. Why would the principal be so concerned about how they will evaluate the program?

D. Fourth Meeting Discussion Questions

1. Once again we see a failure to communicate specific requirements and deadlines. What could members have done to remedy this?
2. Ms. Troast, the principal, is reluctant to have an outsider come into the school to supervise the Math Connection Center. Why would she be so concerned about it? Why do you think she would prefer one of her own teachers?
3. Mr. Unger sees Dr. Davis and Dr. Thompson as key players in the group. However, Dr. Davis states that, since Mr. Unger wants the group's decisions to fit his vision of what the math center should be, she is confused about her role and the purpose of the committee's work. And, Dr. Thompson, coming from the university setting, feels like an outsider. What are the issues at play here? What might Dr. Davis and Dr. Thompson do in this situation?

E. Fifth Meeting Discussion Questions

1. Compare the final outcome of the planning process with the original goals of the group. Did the members of the group accomplish their objectives? How do you account for this? Would you agree that their efforts were successful?
2. All of the members of the group except Harry thought that the last meeting was the most productive. Why do you think he was so dissatisfied with the decisions that were made? What might account for this? What does this tell you about Mr. Unger's motivations?
3. How would you measure the effectiveness of the math center?
4. How did the perceptions of the various members differ? Identify the top priorities of each member.
5. This group sought the advice of a management consultant. Why didn't they follow the advice? They attempted to follow a strategic planning process. Why did the process bog down?
6. In your opinion, where should the committee go from here? Which issues are still unresolved?

APPENDIX A

MEMBERS OF THE PLANNING COMMITTEE

Math Specialist - Dr. Dianne Davis

Dr. Davis has worked as an educator the past 30 years, as a secondary mathematics teacher and an instructor in higher education. She was hired by this school district from out of state seven years ago to assume the position of Teacher Specialist for Mathematics for the entire school district. She is responsible for overseeing all mathematics instruction, secondary as well as elementary level, coordinating the selection of all curricular materials, and providing in-service training for professionals and paraprofessionals within the school district. She sees her primary role as helping teachers adapt materials and techniques to meet the individual needs of students.

PTA President - Nancy Dobbs

Nancy has two children attending Taylor Elementary. She has been an active member of the PTA since her fifth-grade son entered kindergarten. This is her second term of office as president of the local PTA. She has successfully organized several fund raisers, is responsible for the Hands-on Science Program, and has served on a state PTA committee.

Classroom Teacher - Laura Smith

Laura has been an elementary school teacher in our district for the past 20 years. She has recently completed a two-year Math Specialist Training Program sponsored locally by the school district. Through this training, Laura learned about current research in the field of mathematics education, strategies for the use of manipulatives to develop mathematical concepts, and the importance of building problem-solving skills in youngsters through the use of everyday, real-life situations. Next year, she has been appointed the Mathematics Specialist in her building.

University Professor - Dr. Brenda Thompson

Dr. Thompson has served Sacred Heart University for the past six years as an associate professor of education. The university is a private institution enrolling a total of approximately 3,000 students, 600 of which are enrolled in the Masters of Education Program on a full- or part-time basis. Aside from teaching two sections of an integrated math and science methods course, she also teaches a section of a course on the use of educational technology. At least one semester during the school year, she also supervises two student teachers.

Principal - Helen Troast

Ms. Troast has worked for the School District for 14 years. She has served as principal of Taylor Elementary School for the past two years. She is very proud of the fact that under her supervision, student achievement, as measured by standardized tests, has continued in a positive trend and that minority student achievement has increased.

Director of Academic Resources Coalition and a Parent - Harry Unger

Harry Unger, a retired military officer, is currently employed as a senior systems analyst for a small computer engineering firm. He has been concerned about the plight of at-risk students for a long time, but it was not until his own children entered school four years ago that he discovered how he could help. He formed the Academic Resources Coalition (ARC) to promote volunteerism within the schools; it is the largest single provider of academic mentors to the school district. Mr. Unger's interest in establishing this math center stems from his concern about low test scores in the district and his conviction that a properly focused coalition of school personnel and community volunteers could effectively redress this problem in a manner that was both cost-effective and sustainable.

APPENDIX B

COMMITTEE ROLES AND RESPONSIBILITIES

University Professor - Project Director
- * Serve as project director
- * Maintain official financial records of project funds
- * Serve as liaison between university and elementary school
- * Provide training for staff and volunteers
- * Supervise field experiences of University students
- * Write case study

Parent - Assistant Project Director
- * Document the collaborative process
- * Assist project director in writing the case study
- * Insure the project remains on schedule
- * Recruit community volunteers to staff and support math lab
- * Assist project director in coordinating activities of all participants

Math Specialist
- * Establish concept of operations
- * Facilitate training sessions
- * Select and order materials
- * Coordinate efforts with math curriculum/staff

School Principal
- * Provide space in building for laboratory
- * Facilitate implementation of training
- * Provide administrative/clerical support
- * Serve as liaison between elementary school and university

PTA President
- * Serve as liaison between project personnel and parents
- * Mobilize volunteers to help make lab materials
- * Convey funding requests as necessary to PTA executive board

Classroom Teacher
- * Represent faculty
- * Assess needs of faculty and students
- * Select and order materials

APPENDIX C

Dear Pat,

Here's the list of questions we will be discussing during our phone conference with Brenda tonight.

Harry

1. Do we have to decide between primary and intermediate levels at this point? (i.e., Are some materials the same for both? How much is common?)
2. Let's decide on a maximum number of students that will be served at any session; say, class of 24-36?
3. What are major groupings of materials/projects/topics (e.g., computational, problem solving, etc. that should be addressed in the math lab?
4. Once we have identified the major topics, we need to determine how many of each material we need per child or groups of children.
5. Regarding the last two items, can one identify an ordered hierarchy of materials through which to progress for a given topic?
6. What is the best arrangement for storing materials, considering our room may have alternative daytime uses initially?
7. What is the best type of furniture; desks, small tables, large tables; rectangular or semicircular?
8. How do you structure sessions in the lab? Does everyone work on the same manipulative or different manipulatives addressing the same concept? Are kids always told the purpose of what they are doing or do they just sometimes perform activities and record results? How do you handle different ability groups at the same time?
9. How many adult helpers would one need in a lab/center?
10. What kind of training program would helpers need in order to be effective? What could you put together? Do we need different training for Sacred Heart students, my volunteers, and parents?
11. We want afternoon/evening sessions. Would you structure them by grade or ability level? Would a potpourri of grade and ability levels require significantly more adult support? Would you structure it around various topics or skills and let that determine your grouping?
12. What kinds of stipends would it take for you and/or your aide to work there as instructors?

APPENDIX D

Proposed Materials for Math Connection Center

Item	From	Number	Cost
Pattern Blocks	Math Learning Center	7 boxes	$126.00
Overhead Pattern Blocks	Math Learning Center	1 set	6.00
Geoboards	Math Learning Center	2 boxes of 15	80.00
Overhead Geoboard	Math Learning Center	1	2.50
Geoboard Rubber Bands	Math Learning Center	2 bags	6.00
Colored Inch Tiles	Math Learning Center	7 sets	133.00
Overhead Tiles	Math Learning Center	1	6.00
Two-Colored Counters	Math Learning Center	5 sets	50.00
Dice	Math Learning Center	5 packages	7.50
Overhead Spinner	Math Learning Center	1	0.75
Spinner Components	Math Learning Center	2	3.00
Wooden Cubes	Math Learning Center	2 sets of 5 bags of 100	49.00
Base Ten Set (plastic)	Math Learning Center	7 sets	280.00
Overhead Base Ten	Math Learning Center	1	8.50
Unifix Cubes	Math Learning Center	2 boxes of 1000	136.00
Collection of Math Lessons 3-6 (Marilyn Burns)	Creative Publications	1	19.95
Calculators (Math Explorer)	Creative Publications	set of 30	725.00
Overhead Calculator	Math Learning Center	1	83.00
Subtotal Core Materials			1,722.20
20 Sided Dice		3 packages	21.00
Fraction Bars	Math Learning Center	28 sets	182.00
Overhead Fraction Bars	Math Learning Center	1	9.00
Cube-A-link Cubes	Math Learning Center	2 boxes of 1000	170.00

Item	From	Number	Cost
Fraction Bars,. Teacher's Guide	Math Learning Center	1	18.00
Developing Number Concepts Using Unifix Cubes	Math Learning Center	1	24.00
Family Math	Math Learning Center	1	15.00
Math for Girls and Other Problem Solvers	Math Learning Center	1	10.00
Compasses	Creative Publications	28	82.60
Protractors	Creative Publications	3 sets of 10	19.50
D Stix	Creative Publications	1	28.95
Rulers (15 cm + inch)	Creative Publications	3 sets	36.00
Meter Stickes	Creative Publications	3 sets	87.00
Measuring Tape	Creative Publications	2 sets	19.90
Balance Scale	Creative Publications		22.00
Number Tiles	Creative Publications	6	45.90
Tangrams	Creative Publications	20 sets	17.95
Pattern Block Tracer	Creative Publications	10	52.50
Mirrors (for symmetry)	Creative Publications	1 bucket	38.00
Clocks	Creative Publications	3 sets	23.85
Clocks for Overhead	Creative Publications	1	7.50
Play Money	Creative Publications		33.00
Money for Overhead	Creative Publications	1	7.50
Subtotal Other Materials			971.15
Total Materials			2,693.35
Shelves	Hammetts	2 folding shelves (4 shelves)	876.00
Grand Total*			3,569.35

* Does not inlude shipping

APPENDIX E

TAYLOR ELEMENTARY SCHOOL

Parent Teacher Association Newsletter

The PTA is participating in a collaborative effort to develop, equip, and staff a math center at Taylor. Funded by a $3,000 grant from the Commonwealth Center for the Education of Teachers, representatives from Sacred Heart University, the Academic Resources Coalition, central administration, and Taylor are charged with developing an implementation plan for a high quality, low cost, sustainable math center at our school. The center will emphasize a hands-on, concrete approach to math instruction that generally facilitates a more comprehensive understanding of math concepts by young children.

The proposed math center cannot survive without your support! Parent volunteers are needed to perform a number of functions ranging from construction of math manipulatives to assisting with instruction in the center. Our motto for this recruitment drive is:

"IF YOU WANT TO HELP, YOU WILL BE ASSIGNED A TASK THAT YOU WILL BE QUITE CAPABLE OF PERFORMING AND THAT YOU WILL ENJOY DOING!"

If you have the slightest interest in this opportunity to work together constructively to enhance the educational opportunities available to our children, please contact either Harry Unger or Nancy Dobbs.